



SFS Handbook: Grantee Processing in SFS (Grantee User Manual)

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SFS Handbook: Grantee Processing in SFS

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For questions regarding the information included in this Guide, contact the SFS Help Desk:
Phone: 518-457-7717 or 855-233-8363 (toll free) | Email: HelpDesk@sfs.ny.gov |
Using the SFS Support tile in the SFS Vendor Portal

SFS Handbook: Grantee Processing in SFS

Grantee Processing in SFS

Handbook Description:

This Handbook provides the knowledge and skills to support grants management activities using the [Statewide Financial System \(SFS\) Public Portal](#) and the [SFS Vendor Portal](#). The end-to-end grants management business process includes prequalification, searching for grant opportunities, bid submission, bid award, contract collaboration and execution, progress reporting, claims submission and payment processing.

The Statewide Financial System (SFS) is New York State (NYS) government's accounting and financial management system used to manage contracts and payments.

Using SFS, Agencies post grant opportunities in the form of bid events. From the SFS Public Portal, prospective grantees and the general public can search for grant opportunities (also known as bid events) and sign up to receive grant notifications.

Prospective grantees interested in responding to a grant opportunity must have credentials to access* the SFS Vendor Portal and be prequalified. Prequalification is a process applicable to Non-profits (or other organizations as defined by State policy) that requires the completion and acceptance of an online application to compete for state funding. Non-profits complete prequalification applications and submit them for agency review. Agencies are responsible for reviewing submitted prequalification applications and taking action on the application (e.g., approving it or returning it back for additional information).

Prequalified grantees log in to the SFS Vendor Portal to submit their bid response to the agency for review. The agency scores and reviews bid responses in order to award a grant to a grantee. The Grantee is the legal entity to which a grant is awarded and who is accountable for the use of the funds. Grantees collaborate with agencies on grant contract development and approval.

Once a grant contract has been approved, grantees can initiate and submit progress reports in the SFS Vendor Portal for agency review and approval. Grantees are encouraged to discuss the process for submitting claims with the agency they are doing business with, to confirm how payments will be processed based on the terms of the contract agreement.

***Note:** The SFS Delegated Administrator (Admin) within each organization is responsible for managing SFS Vendor Portal account changes, designating roles for User IDs within their organization, and managing address and contact information. Roles control what an individual has access to do and the tasks they can perform in the SFS Vendor Portal. Additional information regarding roles can be found in the [SFS Vendor Role Guide](#) and the [Vendor Portal Access Reference Guide](#).

Handbook Concepts:

This Grantee Handbook explores the following concepts:

- Searching and Viewing Bid Events (Grant Opportunities)
- Subscribing to Email Notifications
- Maintaining Grantee Information
- Managing Prequalification
- Responding to Bid Events
- Reviewing and Approving Grant Contracts
- Entering and Maintaining Grant Claims
- Running Grantee Reports

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Using SFS Handbooks:

This Handbook includes multiple lessons and training topics. Each training topic includes a series of steps which walkthrough how to perform a specific task. There are different types of steps within a training topic: steps that are action oriented, and steps that are intended to provide additional information and context to assist you with performing a task.

- Handbook steps that include text in **bold blue font** indicate that action is required (e.g., Click the **Add** button).
- Handbook steps that include text in **bold red font** are used for illustrative data entry purposes (e.g., Enter the applicable value into the **Schedule ID** field. For example, Enter "**5243**".)
- Handbook steps that include text in **bold black font** provide additional information and clarification about an SFS page, field, process, report, navigational elements, and processing tips (e.g., The **Process Scheduler Request** page displays. This page is used to verify and/or select the process that you want to run.)

Searching and Viewing Bid Events (Grant Opportunities)

Lesson Description:

This lesson provides the knowledge and skills to search and view Bid Events. Bid Events are posted by Agencies to allow bidders to submit responses in order to apply for a funding award. Bid Events are created by Agencies to capture details about a grant opportunity. It is comprised of customizable questions, fields, and attachments specific for the need of each award.

Lesson Objectives:

In this lesson, you will learn how to:

- Search and view bid events

Search for a Bid Event (Grant Opportunity) on the SFS Public Portal

Topic Description:

This topic provides the knowledge and skills to search for and view bid events.

Topic Objectives:

In this topic, you will learn:

- How to search for and view bid events

SFS role required to perform this task:

- No role required. Users do not need to log in to SFS to search for grant opportunities on the SFS Public Portal.

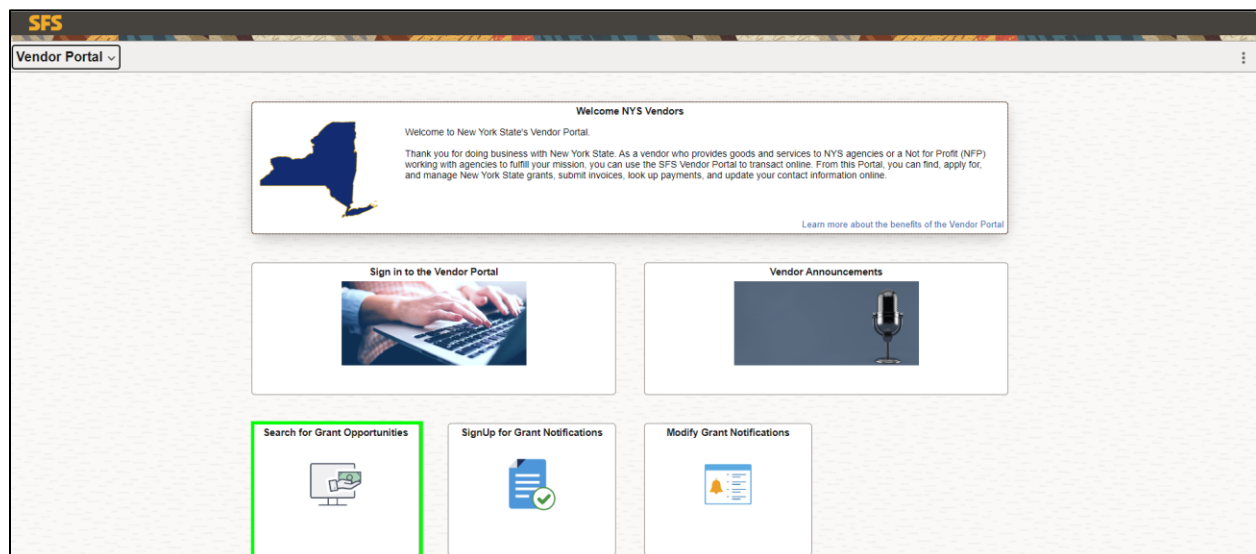
Procedure

Scenario: As a member of the public, you can search and view public bid events (grant opportunities) without signing in to the SFS Vendor Portal by visiting the [SFS Public Portal Homepage](#) and selecting the **Search for Grant Opportunities** tile.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

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Step	Action
1.	Navigate to the SFS Public Portal Homepage . Note: Users <u>DO NOT</u> need to log in to SFS, as this is a public page.
2.	Note: If you experience issues within the Vendor Portal, you may need to clear your browser cache. You can press Ctrl+Shift+Del to expedite the clearing process. Also, verify the Passwords checkbox is unselected. This will allow you to keep all saved passwords and usernames after clearing your cache.



Step	Action
3.	From the SFS Public Portal Homepage, click the Search for Grant Opportunities tile.

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Search for Grant Opportunities

Enter the search criteria and click the Search button

Search Criteria

Event ID

Search by Grant Opportunity

Search by Due Date From To

Search by Status **Available**

Search by Eligibility

Search by Funding Agency

Search by Service Area **Environmental Supp.**

Search **Clear Criteria**

Search Results

Event ID ↓	Funding Agency	Grant Opportunity	Status	Eligibility	Availability Date ↓	Anticipated Release Date	Due Date ↑
EVT0000001	AGM01	Climate Resilient Farming Round 8	Advertised Only - Not in SFS	Governmental Entity	05/01/24 12:00AM	05/01/24 12:00AM	06/24/2024 5:00PM EDT
EVT0000001	DEC01	2024 Zero Emission Vehicle Grant Program	Available	Governmental Entity	04/25/24 9:00AM	04/26/24 8:00AM	09/27/2024 3:00PM EDT
EJICIG 11	DEC01	EJ Community Impact Grant	Available	Not-For-Profit	03/29/24 12:30PM	04/29/24 8:00AM	08/07/2024 3:00PM EDT

Step	Action
4.	The Search for Grant Opportunities page is used to search for opportunities posted by agencies. Enter the applicable search criteria in the Search Criteria fields. In this example, we will search for grant opportunities by Status and by Service Area, which are the most common search methods.
5.	The Search by Status options are: • Anticipated: Represents summary information about an upcoming Bid Event (grant opportunity) which is provided for review only. Bid Responses (applications) cannot be started until the Bid Event becomes Available (published). ○ Includes only bid events in “Anticipated” status in the search results. • Available: Represents a Bid Event (grant opportunity) that is available for review and open for potential grantees to start a Bid Response (application). Bid Responses can be submitted beginning on the Event Start Date. ○ Includes bid events in “Available” and “Advertised Only-Not if SFS” statuses in the search results. ○ Note: “Advertised Only – Not in SFS” status represents summary information about a grant opportunity managed outside of SFS and is provided for review only. Directions on where to find additional information about the grant opportunity, including where to apply, are provided. • Anticipated and Available: Includes bid events in “Anticipated”, “Available”, and “Advertised Only-Not if SFS” statuses in the search results. • Closed: Includes only bid events where the end date has passed, and grantees can no longer bid on the grant opportunity.

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Step	Action
6.	In this example, we will click the Search by Status field drop-down list and select the Available list item.
7.	When you search by Service Area , only the bid events represented by the selected service area will display in the search results.
8.	In this example, we will click the Search by Service Area field drop-down list and select the Environmental Supports list item.
9.	Click the Search button.
10.	Note: A list of Event IDs will populate in the Search Results based on the current search criteria. Click the applicable link in the Grant Opportunity column to view the abstract details. Grant Opportunity

Search for Grant Opportunities

Overview

[View Grant Opportunity](#)
[Log into SFS and Apply for Grant](#)
[Return to Search](#)

Grant Opportunity ID: EVT0000001
Agency: Dept of Environ Conservation
Grant Opportunity: 2024 Zero Emission Vehicle Grant Program
Contact Name: John Doe
Contact Email: John.Doe@test.ny.gov

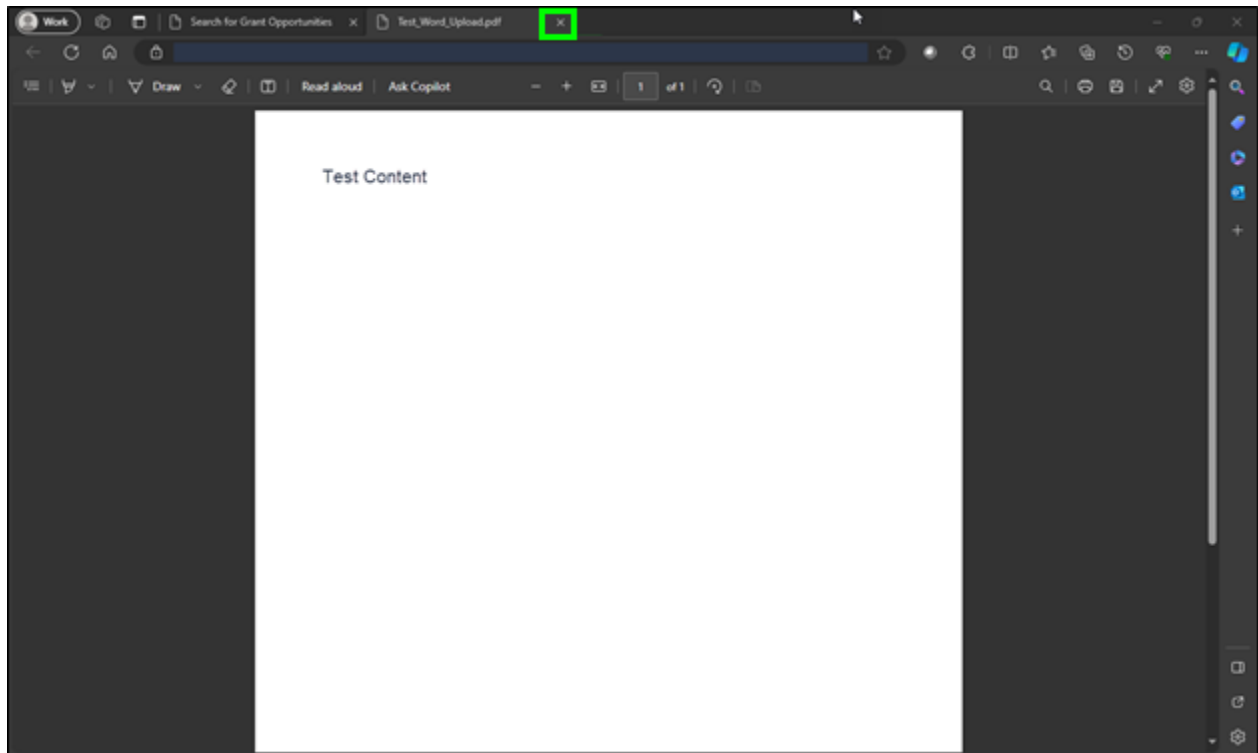
Solicitation Profile
The New York State Department of Environmental Conservation is pleased to announce the availability of \$750,000 in rebates to municipalities for the purchase or lease of battery electric, plug-in hybrid, and hydrogen fuel cell vehicles for municipal fleet use. Applications are accepted via the Statewide Financial System (SFS) on a rolling basis and awards are made on a rolling basis as well until September 27, 2024 or until funds have been exhausted.

Full Announcement Details

Announcement Link: <https://dec.ny.gov>
Applications Due (Date / Time): September 27, 2024 / 03:00 PM
Bidder's Conference(s)/Application Workshop(s):
Anticipated Award Date:
Anticipated Initial Contract Length: 0 Month(s)
Total Funding Available: \$750,000.000
Letter of Intent Narrative:
Letter of Intent Due:
Questions Due Date: Friday, September 20, 2024
Questions and Answers Narrative:
Questions and Answers Posting Type:
Questions and Answers Posting Date: 09/27/2024
Questions and Answers Link or Upload:
Eligible Applicants: Governmental Entity
Service Area(s): Environmental Supports

Step	Action
11.	Click the View Grant Opportunity button to view the Request for Proposal (RFP) pdf associated to the grant opportunity.

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Step	Action
12.	Click the Close (X) browser tab when you are finished viewing the Request for Proposal (RFP) pdf associated to the grant opportunity.

Search for Grant Opportunities

Overview

View Grant Opportunity

Log into SFS and Apply for Grant

Return to Search

Grant Opportunity ID: EVT0000001

Agency: Dept of Environ Conservation

Grant Opportunity: 2024 Zero Emission Vehicle Grant Program

Contact Name: John Doe

Contact Email: John.Doe@test.ny.gov

Solicitation Profile: The New York State Department of Environmental Conservation is pleased to announce the availability of \$750,000 in rebates to municipalities for the purchase or lease of battery electric, plug-in hybrid, and hydrogen fuel cell vehicles for municipal fleet use. Applications are accepted via the Statewide Financial System (SFS) on a rolling basis and awards are made on a rolling basis as well until September 27, 2024 or until funds have been exhausted.

Full Announcement Details

Announcement Link: <https://dec.ny.gov>

Applications Due (Date / Time): September 27, 2024 / 03:00 PM

Bidder's Conference(s)/Application Workshop(s):

Anticipated Award Date:

Anticipated Initial Contract Length: 0 Month(s)

Total Funding Available: \$750,000.000

Letter of Intent Narrative: .

Letter of Intent Due:

Questions Due Date: Friday, September 20, 2024

Questions and Answers Narrative: .

Questions and Answers Posting Type:

Questions and Answers Posting Date: 09/27/2024

Questions and Answers Link or Upload:

Eligible Applicants: Governmental Entity

Service Area(s): Environmental Supports

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Step	Action
13.	Note: If you have access to login to the SFS Vendor Portal and are interested in applying for this grant, click the Log into SFS and Apply for Grant button to access the SFS Vendor portal. In this training example, we will not click the Log into SFS and Apply for Grant button.
14.	Note: If you do not have access to the SFS Vendor Portal and if your organization is already established within the SFS Vendor portal, an SFS Delegated Administrator has been authorized within your organization to provision user login credentials, unlock accounts, or reset passwords. Please reach out to your SFS Delegated Administrator directly. Also, if you do not have a login and if you are new to the SFS Vendor portal, and would like to establish an account for the purposes of doing business with the State of New York, access the Grants Management website for instructions on how to register your organization. (https://grantsmanagement.ny.gov/register-your-organization-sfs).

The screenshot shows the 'Search for Grant Opportunities' page. On the left, there are three buttons: 'View Grant Opportunity', 'Log into SFS and Apply for Grant', and 'Return to Search'. The 'Return to Search' button is highlighted with a green border. The main content area is titled 'Overview' and displays details for a specific grant opportunity. Below this, there is a section titled 'Full Announcement Details' which lists various dates and links related to the grant.

Overview	
Grant Opportunity ID	EVT0000001
Agency	Dept of Environ Conservtion
Grant Opportunity	2024 Zero Emission Vehicle Grant Program
Contact Name	John Doe
Contact Email	John.Doe@test.ny.gov
Solicitation Profile	The New York State Department of Environmental Conservation is pleased to announce the availability of \$750,000 in rebates to municipalities for the purchase or lease of battery electric, plug-in hybrid, and hydrogen fuel cell vehicles for municipal fleet use. Applications are accepted via the Statewide Financial System (SFS) on a rolling basis and awards are made on a rolling basis as well until September 27, 2024 or until funds have been exhausted.

Full Announcement Details	
Announcement Link	https://dec.ny.gov
Applications Due (Date / Time)	September 27, 2024 / 03:00 PM
Bidder's Conference(s)/Application Workshop(s)	
Anticipated Award Date	
Anticipated Initial Contract Length	0 Month(s)
Total Funding Available	\$750,000.000
Letter of Intent Narrative	
Letter of Intent Due	
Questions Due Date	Friday, September 20, 2024
Questions and Answers Narrative	
Questions and Answers Posting Type	
Questions and Answers Posting Date	09/27/2024
Questions and Answers Link or Upload	
Eligible Applicants	Governmental Entity
Service Areas(s)	Environmental Supports

Step	Action
15.	Click the Return to Search button to return to the Search for Grant Opportunities page.
16.	You have successfully completed the Search For a Bid Event (Grant Opportunity) On the SFS Public Portal topic.

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Subscribing to Email Notifications

Lesson Description:

This lesson provides the knowledge and skills for Grantees to subscribe to email notifications to receive information about grant opportunities for one or more service areas.

Lesson Objectives:

In this lesson, you will learn how to:

- Subscribe to email notifications.

Subscribe to Email Notifications

Topic Description:

This topic provides the knowledge and skills to subscribe to email notifications to receive information about grant opportunities for one or more service areas.

Topic Objectives:

In this topic, you will learn:

- How to subscribe to email notifications

SFS role required to perform this task:

- No role required. Users do not need to log in to SFS to subscribe to email notifications on the SFS Public Portal.

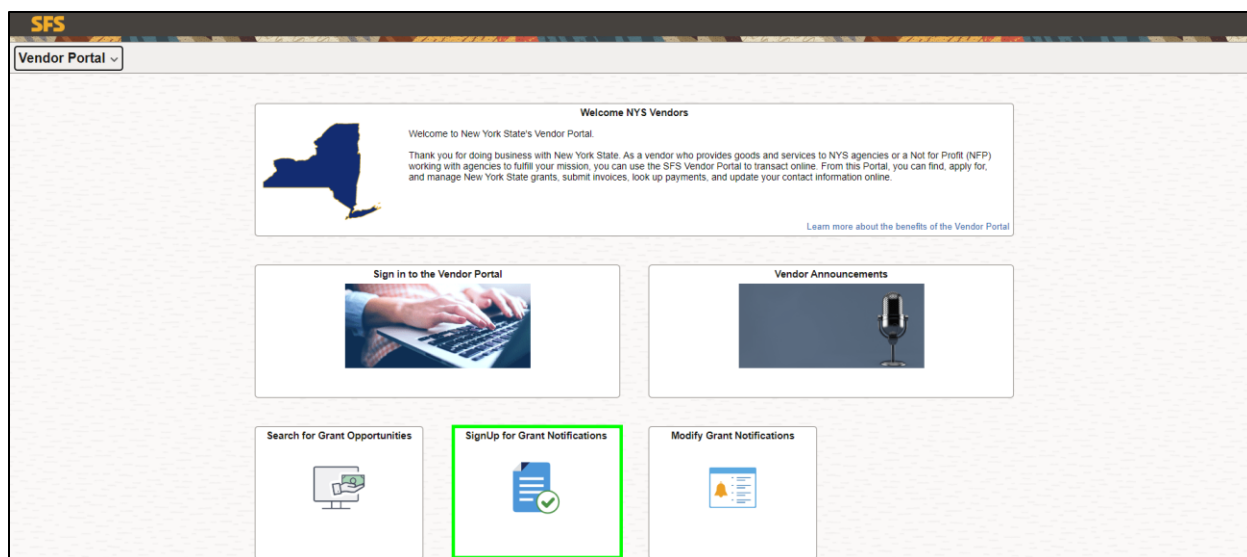
Procedure

Scenario: As a member of the public, you will subscribe to email notifications to receive information about grant opportunities without signing in to the SFS Vendor Portal.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

Step	Action
1.	Navigate to SFS Public Portal Homepage . Note: Users <u>DO NOT</u> need to log in to SFS, as this is a public page.
2.	Note: If you experience issues within the Vendor Portal, you may need to clear your browser cache. You can press Ctrl+Shift+Del to expedite the clearing process. Also, verify the Passwords checkbox is unselected. This will allow you to keep all saved passwords and usernames after clearing your cache.

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Step	Action
3.	Click the SignUp for Grant Notifications tile.

Step	Action
4.	Note: Use the Information section to enter name, organization, and email address for the contact who should receive the email notifications.
5.	Enter the applicable value into the First Name field.
6.	Enter the applicable value into the Last Name field.
7.	Enter the applicable value into the Organization field.
8.	Enter the applicable value into the Email field.
9.	Enter the applicable value into the Confirm Email field.

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Step	Action
10.	Note: In the Service Area Preferences section, there are two main notification lists. These main lists are: Health and Human Services , and Non Health and Human Services . Click the checkbox next to the main list item to receive all notifications for that main list item.
11.	Note: To view description details for each Service Area, click the Click here link.
12.	Click the applicable Service Area checkboxes.
13.	Click the Sign Up button to sign up for email notifications for the selected service areas. Note: When the Bid Event is published, an email notification advertising it will be sent to people who signed up for notifications about the service area(s) chosen.
14.	You have successfully completed the Subscribing to Email Notifications topic.

Modifying Email Notifications

Lesson Description:

This lesson provides the knowledge and skills for Grantees to modify contact information and/or service area preferences previously selected for email notifications.

Lesson Objectives:

In this lesson, you will learn how to:

- Modify contact information and/or service area preferences previously selected for email notifications.

Modify Email Notifications

Topic Description:

This topic provides the knowledge and skills to modify contact information and/or service area preferences previously selected for email notifications.

Topic Objectives:

In this topic, you will learn:

- How to modify contact information and/or service area preferences previously selected for email notifications.

SFS role required to perform this task:

- No role required. Users do not need to log in to SFS to modify contact information and/or service area preferences previously selected for email notifications.

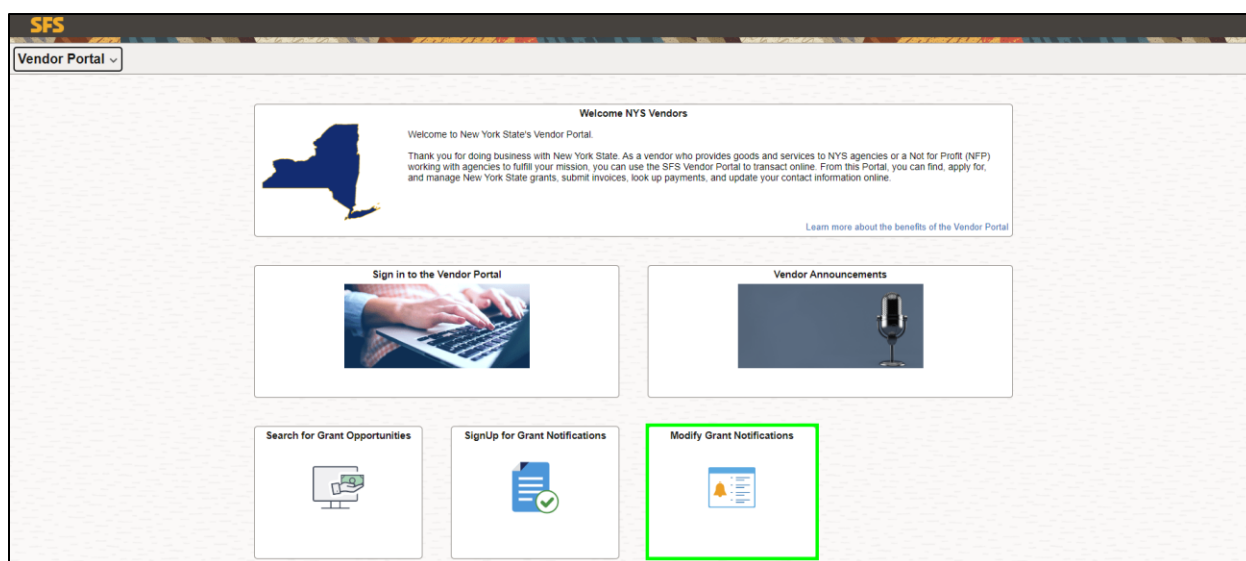
Procedure

Scenario: As a member of the public, you will modify contact information and/or service area preferences previously selected for email notifications without signing in to the SFS Vendor Portal.

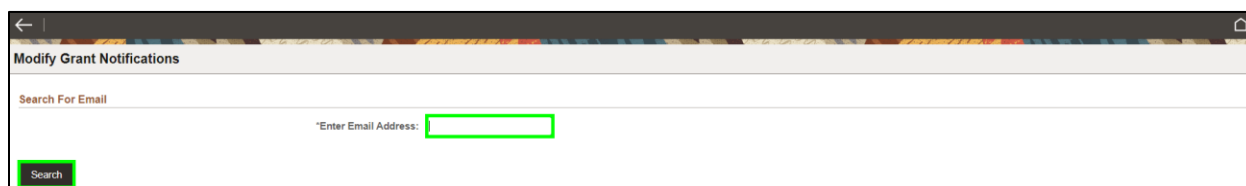
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Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

Step	Action
1.	Navigate to SFS Public Portal Homepage . Note: Users DO NOT need to log in to SFS, as this is a public page.
2.	Note: If you experience issues within the Vendor Portal, you may need to clear your browser cache. You can press Ctrl+Shift+Del to expedite the clearing process. Also, verify the Passwords checkbox is unselected. This will allow you to keep all saved passwords and usernames after clearing your cache.



Step	Action
3.	Click the Modify Grant Notifications tile to modify contact information and/or service area preferences previously selected for email notifications.



Step	Action
4.	Enter the email address that was used to sign up for notifications, into the Enter Email Address field.
5.	Click the Search button.

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 |

Sign Up Grant Notifications

Information

Complete all required fields below.
Select the Sign-Up button below to complete the process.

*First Name

John

*Last Name

Doe

*Organization

NFP ORG

*Email

tst@tst.com

*Confirm Email

tst@tst.com

Service Area Preferences

Select the checkbox next to the service area or service areas you wish to be notified about.
[Click here](#) for a description of each service area.

☐ Select/De-Select All

☐ Health and Human Services

- ☐ Education Supports
- ☐ Family Supports
- ☒ Health Services
- ☐ Housing and Shelter Services
- ☒ Justice Services
- ☒ Workforce Development

☐ Non Health and Human Services

- ☐ Agricultural Supports
- ☐ Environmental Supports
- ☐ Public Transportation Services
- ☐ Public Safety Supports
- ☐ Government Supports

☐ Un-subscribe

Save

Step	Action
6.	Your previous information and selections will populate. Update your information and/or service area preferences.
7.	To un-subscribe from all prior selected service areas, click the Un-subscribe checkbox.
8.	Click the Save button to save your changes.
9.	You have successfully completed the Modifying Email Notifications topic.

Maintaining Grantee Information

Lesson Description:

This lesson provides the knowledge and skills to maintain Grantee Information.

Lesson Objectives:

In this lesson, you will learn how to:

- View and Update Grantee Information
- Adding a Grantee Contract Approver's Name to their Profile in SFS

View and Update Grantee Information

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Topic Description:

This topic shows how to update a grantee's grant organizational profile information in the SFS Vendor Portal. Grantees doing business with New York State agencies access SFS by clicking the **Vendor Portal Login** from the [SFS website](#). There is a specific page in SFS where Grantees can view and make updates to their grant information.

Note: An SFS Vendor Portal account is required to access SFS.

Topic Objectives:

In this topic, you will learn:

- How to update a grantee's grant organizational profile information in SFS

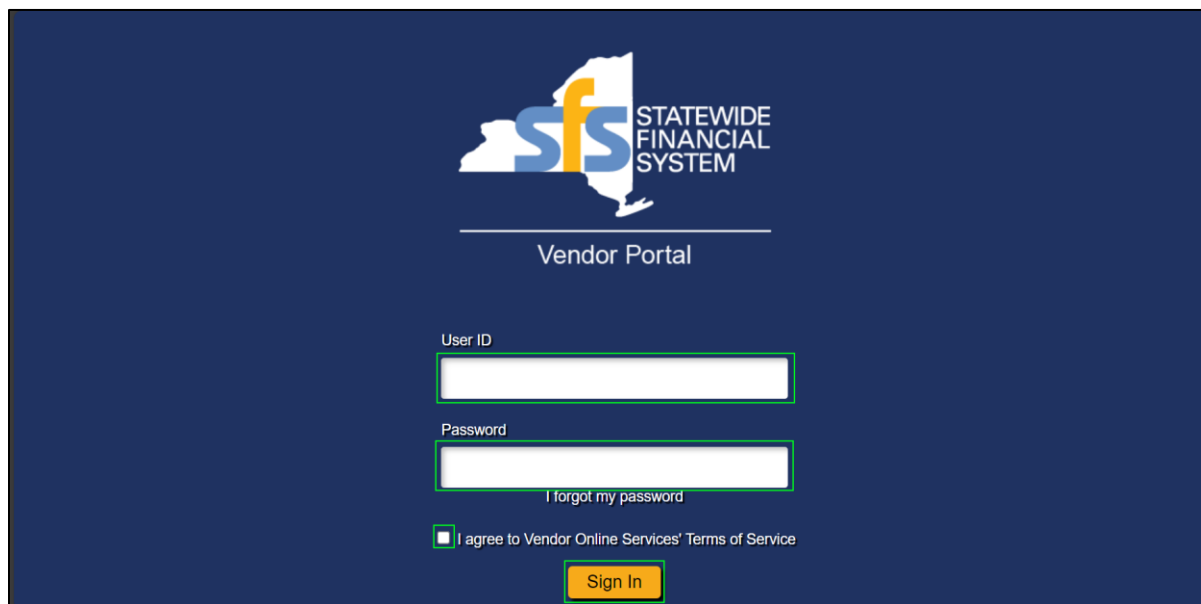
SFS role required to perform this task:

- Delegated Admin (NY_ES_SUPPLIER_ADMIN)

Procedure

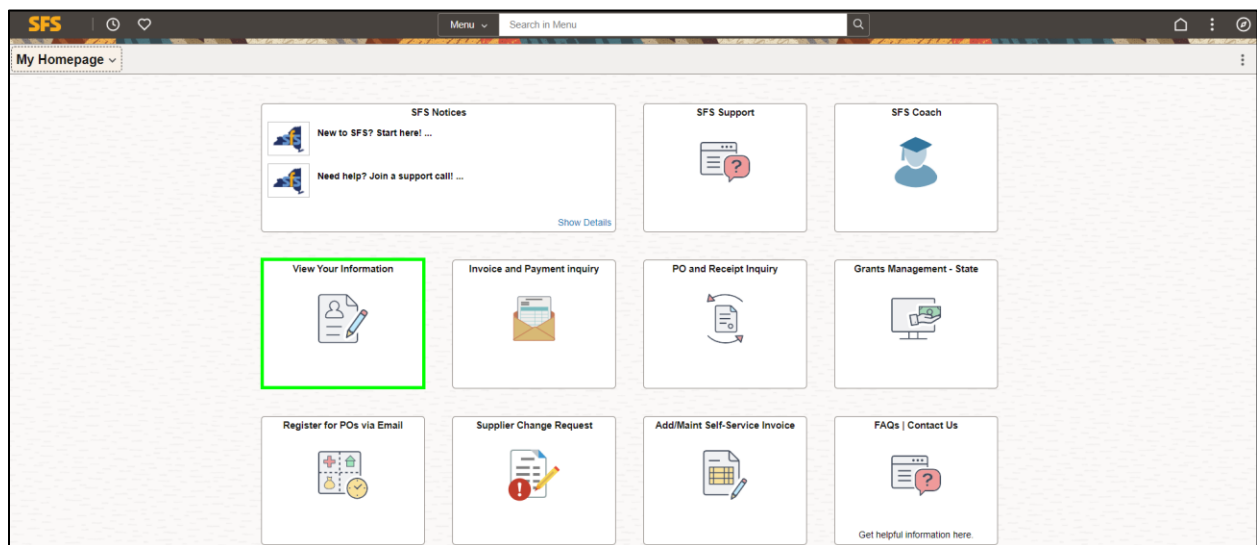
Scenario: You look up your organization's grant information in the SFS Vendor Portal and notice that some information needs to be updated. You will log in to the SFS Vendor Portal and make the applicable grant information updates before submitting for review and approval.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

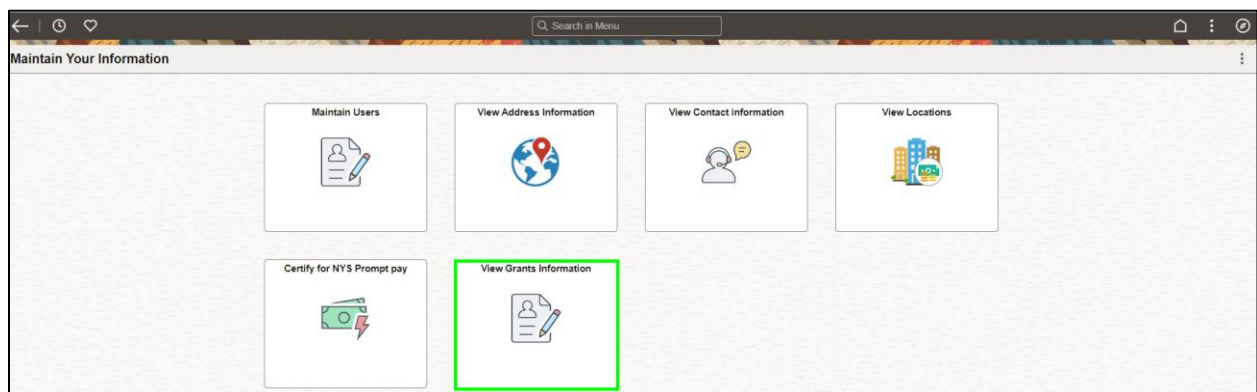


Step	Action
1.	Begin by navigating to the SFS Vendor Portal .
2.	Enter your User ID and Password and select the I agree to Vendor Online Services' Terms of Service checkbox.
3.	Click the Sign In button.

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Step	Action
4.	From the Homepage click the View Your Information tile.



Step	Action
5.	Click the View Grants Information tile.

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View Grants Information

SetID: SHARE Supplier ID: 1100314197

Find | View All First 1 of 1 Last

Effective Date: 04/04/2024 Prequalification Page
Additional Documents

Prequalification Exemption: ☐ Audit Log

Prequalification Required: ☐

Organization Type: Not-For-Profit Tax Year End Date

Charities Registration No.: 12-34-56 Current Operating Budget: \$1,500,000.00

Exemption State/Code: N/A

Prequalification Status: In Review By Agency Number of Part Time Staff: 10

Prequalification Exp. Date: 02/15/2027 Number of Volunteers: 2

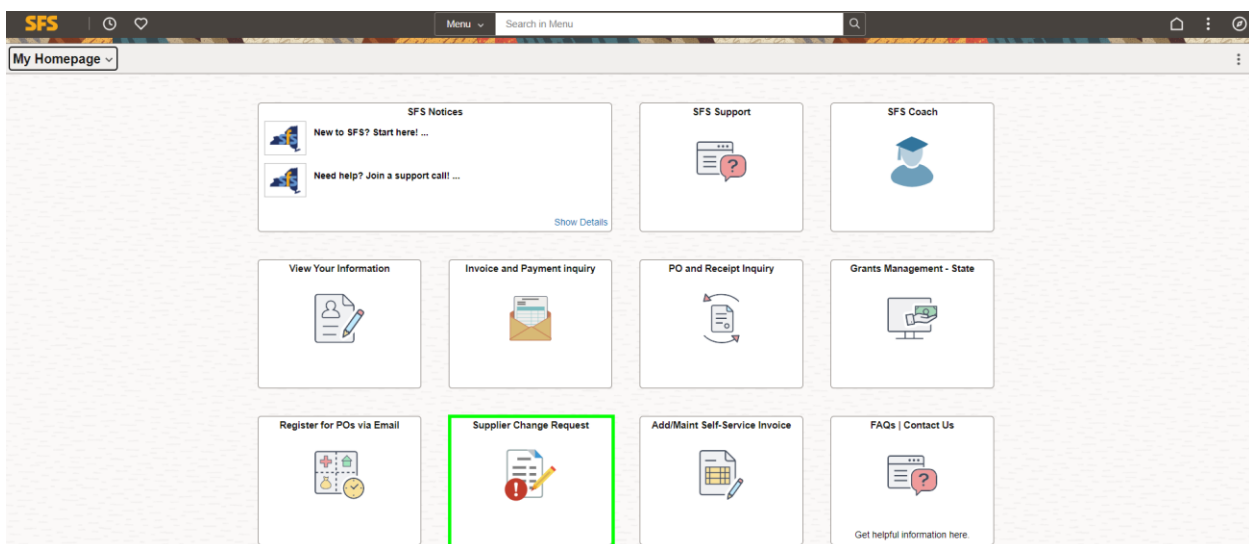
Number of Full Time Staff: 3

Sectionary Entity: ☐

Mission Statement: Our mission is to improve the quality of life for young people. We achieve this by educating, providing services and a safe environment to prevent incarceration, recidivism and homelessness. Our ultimate goal is to prepare participants to become productive members of society.

Save Return to Search

Step	Action
6.	Review the information. If changes are needed, initiate a Supplier Change Request.
7.	Note: - The Supplier Change Request feature in SFS allows grantees to make changes to their organization profile, addresses, contacts, banking information, and grant information. - Requests to change Primary Contact, Legal Business Name, Remittance Address and Banking require approval by the Office of the State Comptroller's Vendor Management Unit.
8.	Click the Home icon to go back to the Homepage to initiate the Supplier Change Request. 



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Step	Action
9.	Click the Supplier Change Request tile.

Welcome Doe, John

Navigation: Welcome | Company Profile | Addresses | Contacts | Payment Profile | **GM Info** | Submit

Buttons: Exit | Save for Later | < Previous | Next > | Review Changes

(Outreach Organization)

Welcome! Click the icons at the top of the page or Next to make changes to your Company Name (Company Profile), Address (Addresses), Contacts (Contacts) or Banking information (Payment Profile).

Requests to change Primary Contact, Legal Business Name, Remittance Address and Banking require approval by the Office of the State Comptroller's Vendor Management Unit.

Buttons: Exit | Save for Later | < Previous | Next > | Review Changes

Step	Action
10.	Click the GM Info train stop.

Please update your Grants Management information.

Navigation: Welcome | Company Profile | Addresses | Contacts | Payment Profile | **GM Info** | Submit

Buttons: Exit | Save for Later | < Previous | **Next >** | Review Changes

This information is used by NYS Agencies during the Grants Management Prequalification and/or Grant Opportunity - Vendor Bid Response Review process.

Bidder Grants

Effective Date: 04/04/2024

Prequalification Required: ☐

Organization type: Not-For-Profit

Charities Registration Num: 12-34-56

Exemption State/Code: N/A

Prequalification Status: In Review By Agency

Prequalification Exp. Date: 02/15/2027

Sectarian Entity: ☐

Mission Statement: Our mission is to improve the quality of life for young people. We achieve this by educating, providing services and a safe environment to prevent incarceration, recidivism and homelessness. Our ultimate goal is to prepare participants to become productive members of society.

Tax Year End Date:

Current Operating Budget: \$1,500,000.00

Number of Part Time Staff: 10

Number of Volunteers: 2

Number of Full Time Staff: 3

Buttons: Exit | Save for Later | < Previous | **Next >** | Review Changes

Step	Action
11.	To update the information currently displayed, click the Add a New Row (+) icon.
12.	Make any needed updates to your Grants Management information.
13.	Select Next button.

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Review and Submit Changes for Outreach Organization

Welcome Company Profile Addresses Contacts Payment Profile GM Info Submit

Exit Save for Later < Previous Next >

Requests to change Primary Contact, Legal Business Name, Remittance Addresses and Banking must be authorized. Review your changes before submitting your request. Click the Confirm Changes checkbox to submit your request. Use the "Review" button to review changed information. Use the "Submit" button to submit your change request. Email communication regarding this request will be sent to:

*Audit Reason Code Multiple Changes

Comments 254 characters remaining

☒ Confirm Changes

Review Withdraw Submit

Exit Save for Later < Previous Next >

Step	Action
14.	Select the applicable Audit Reason Code . Note: Audit Reason Code classifies the type of change that was made. Some examples are: Address Change, Name Change, Corrections, etc.
15.	Enter any additional information in the Comments field to clarify what was changed. Note: Comments are optional.
16.	Select Confirm Changes checkbox.
17.	Select Submit button to make the changes. Note: Upon submitting the Supplier Change Request and if updates have only been made to the GM Info train stop (e.g., no updates to Company Profile, Addresses, Contacts, or Payment Profile), the information entered on the GM Info train stop will systematically update the corresponding fields on the View Grants Information Tab. Updates to additional train stops in the Supplier Change Request may require additional approvals before your information is updated in SFS. Any changes made to information on the Grants Information tab will result in a new Effective Dated row.
18.	You have successfully completed the View and Update Grantee Information topic.

Adding a Grant Contract Approver's Name to their Profile in SFS

Topic Description:

This topic shows how to add a grant contract approver's name to their profile in SFS. This is needed so when the contract approver signs the grant contract in SFS, their name will display on the contract agreement.

Topic Objectives:

In this topic, you will learn:

SFS Handbook: Grantee Processing in SFS

- How to add a grant contract approver's name to their profile in SFS

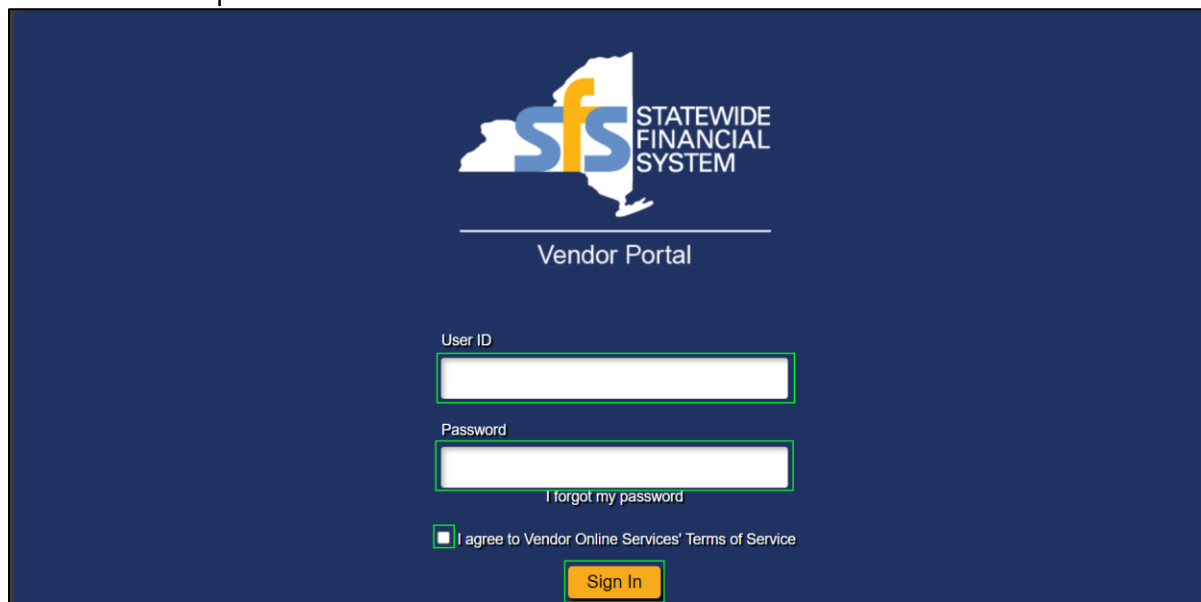
SFS role required to perform this task:

- Delegated Admin (NY_ES_SUPPLIER_ADMIN)

Procedure

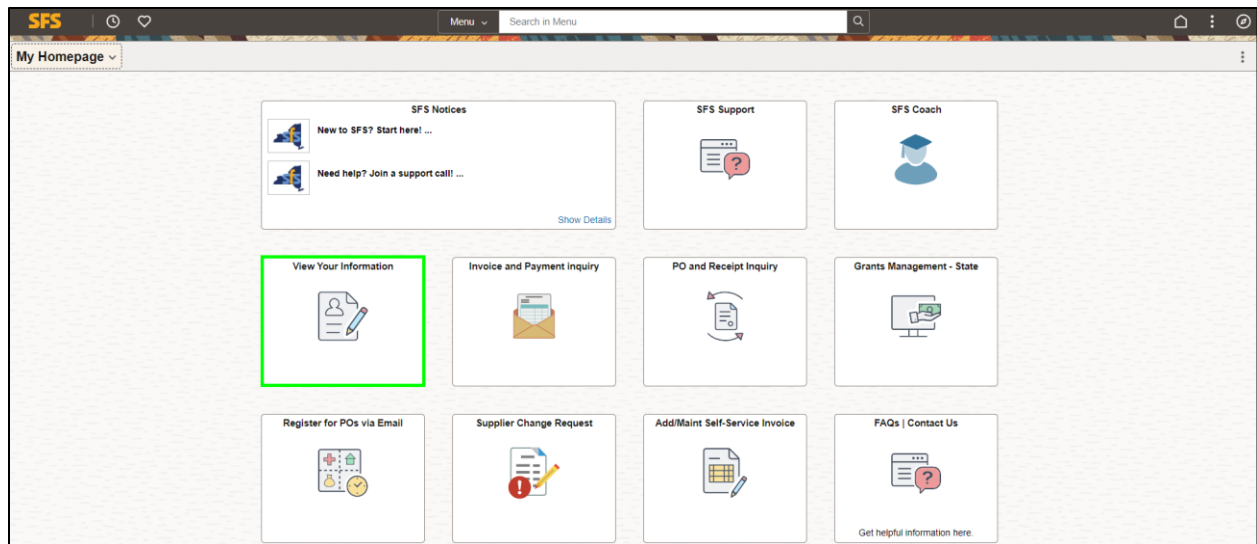
Scenario: As a Delegated Administrator for your organization, you need to add the name of one of your organization's contract approvers to their profile in SFS. This is needed so when the contract approver signs the grant contract in SFS, their name will display on the contract agreement.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

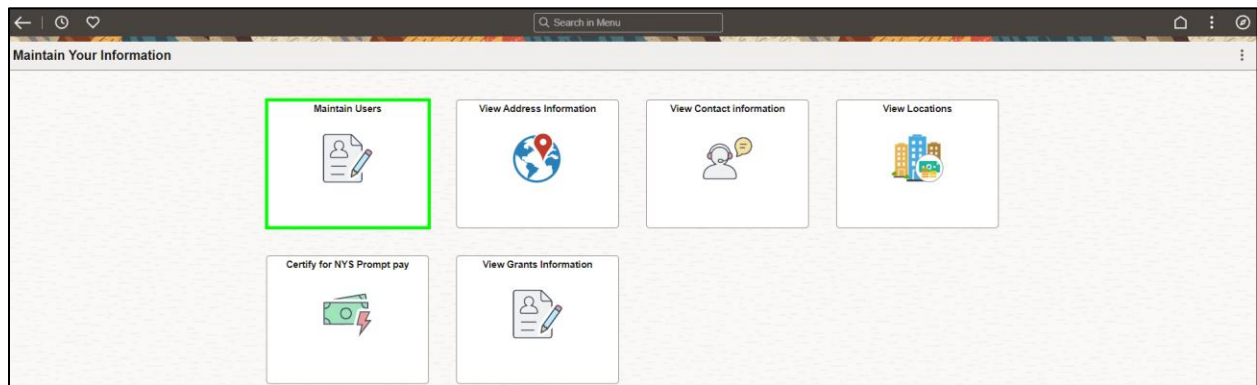


Step	Action
1.	Begin by navigating to the SFS Vendor Portal .
2.	Enter your User ID and Password and select the I agree to Vendor Online Services' Terms of Service checkbox.
3.	Click the Sign In button.

SFS Handbook: Grantee Processing in SFS



Step	Action
4.	Preferred Navigation: Click the View Your Information tile. Alternative Navigation: From the NavBar navigate to: Menu > Maintain Supplier Information > Manage User Profiles.



Step	Action
5.	Click the Maintain Users tile.

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Step	Action
6.	Enter the contract approver's User ID in the User ID begins with field.
7.	Click the Search button.

Step	Action
8.	Enter the contract approver's name (Last Name, First Name) in the Description field. Note: This is needed so when the contract approver signs the grant contract in SFS, their name will display on the contract agreement.
9.	Click the Save button at the bottom of the page to save your changes.
10.	You have successfully completed the Adding a Grant Contract Approver's Name to their Profile in SFS topic.

Managing Prequalification Applications

Lesson Description:

This lesson provides the knowledge and skills to manage Prequalification information. Prequalification is a process applicable to not for profits or other organizations as defined by State policy, which requires the completion and acceptance of an online application in order to compete for state funding. The NYS Division of the Budget (DOB) is the policy-making body that drives the prequalification process.

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Prequalification requires not for profits to complete an online application and receive an approved prequalification status prior to submitting a grant bid response.

Lesson Objectives:

In this lesson, you will learn how to:

- Enter and Submit Prequalification Information

Enter and Submit a Prequalification Application

Topic Description:

This topic provides the knowledge and skills to enter and submit a prequalification application. Organizations must complete an online Prequalification application in SFS which includes answering a series of questions regarding the organization and uploading key organizational documents.

Upon submission of the prequalification application, SFS routes the prequalification application to the state agency with which the organization expects to do the most business with. The agency indicator is based on criteria that exists on the grantee's profile in SFS.

Prequalification Specialists within the agency review the prequalification application. Agencies are responsible for approving the application or returning it back to the organization if it cannot be approved.

Grantees that have successfully prequalified will be assigned a prequalification expiration date based on policy.

Topic Objectives:

In this topic, you will learn:

- How to enter and submit a Prequalification Application

SFS role required to perform this task:

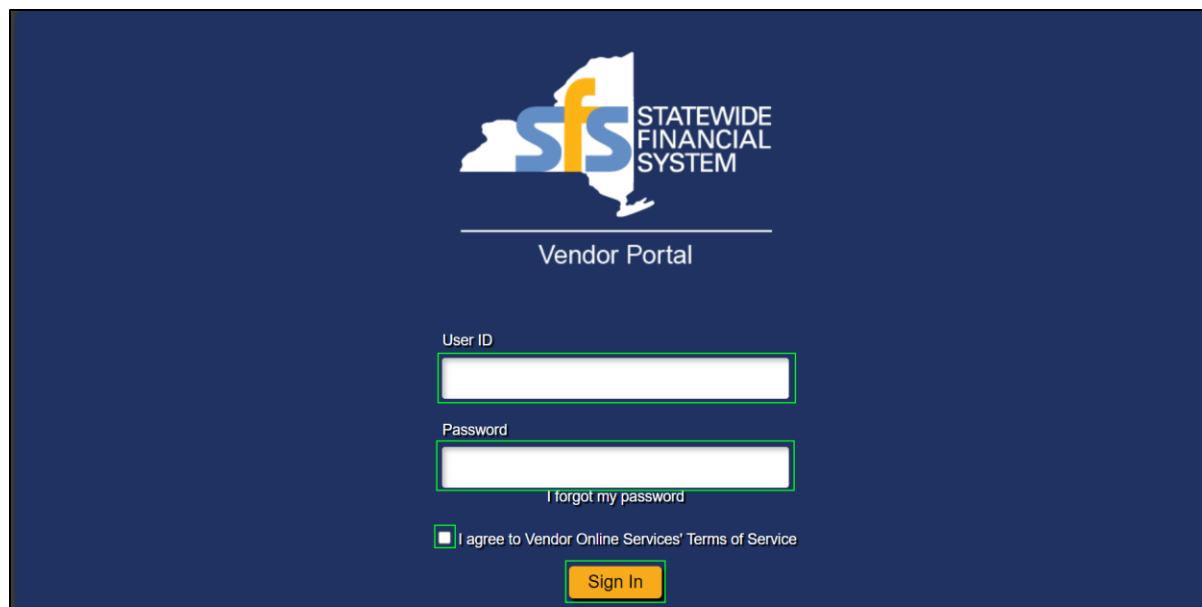
- Prequalification Processor (NY_GM_VENDOR_PREQUAL)

Procedure

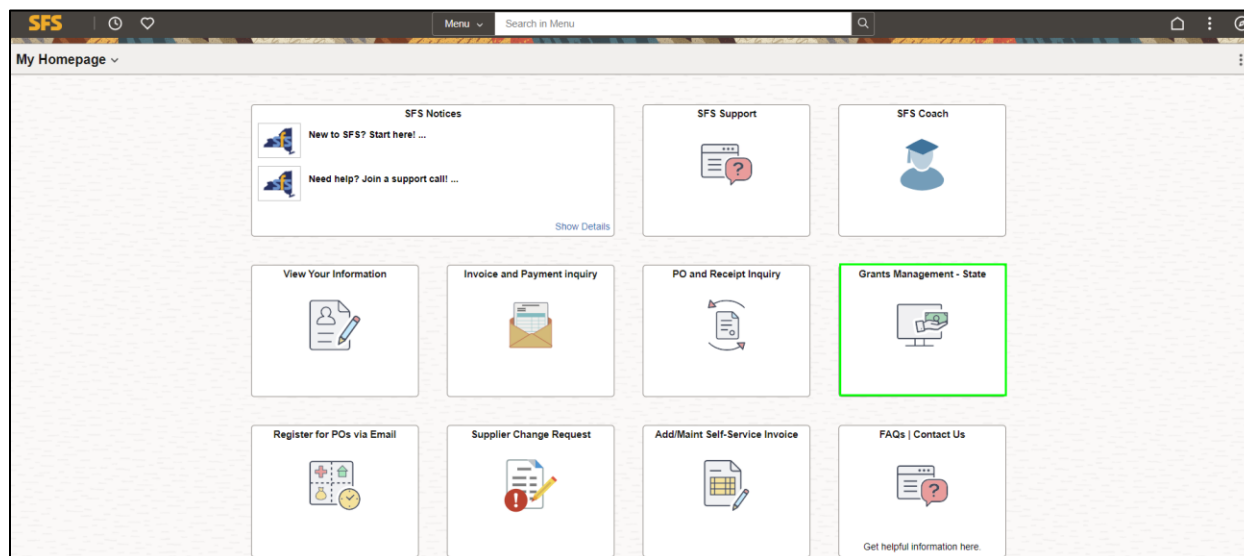
Scenario: As a Grantee User, you wish to apply for a grant, but first you must enter a Prequalification application with the Agency you are seeking the grant from. You will enter and submit a Prequalification application.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in SFS will be driven by the real-life transactional requirements.

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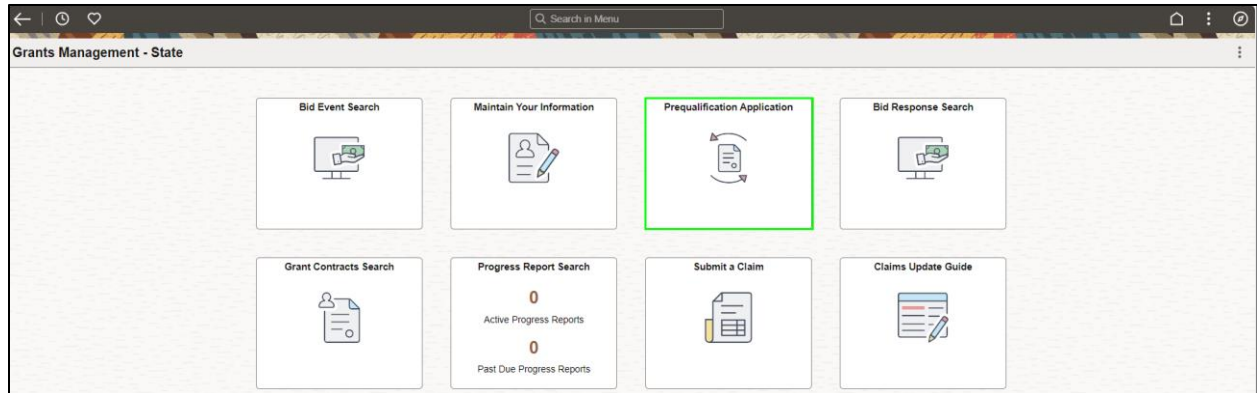


Step	Action
1.	Begin by navigating to the SFS Vendor Portal .
2.	Enter your User ID and Password and select the I agree to Vendor Online Services' Terms of Service checkbox.
3.	Click the Sign In button.

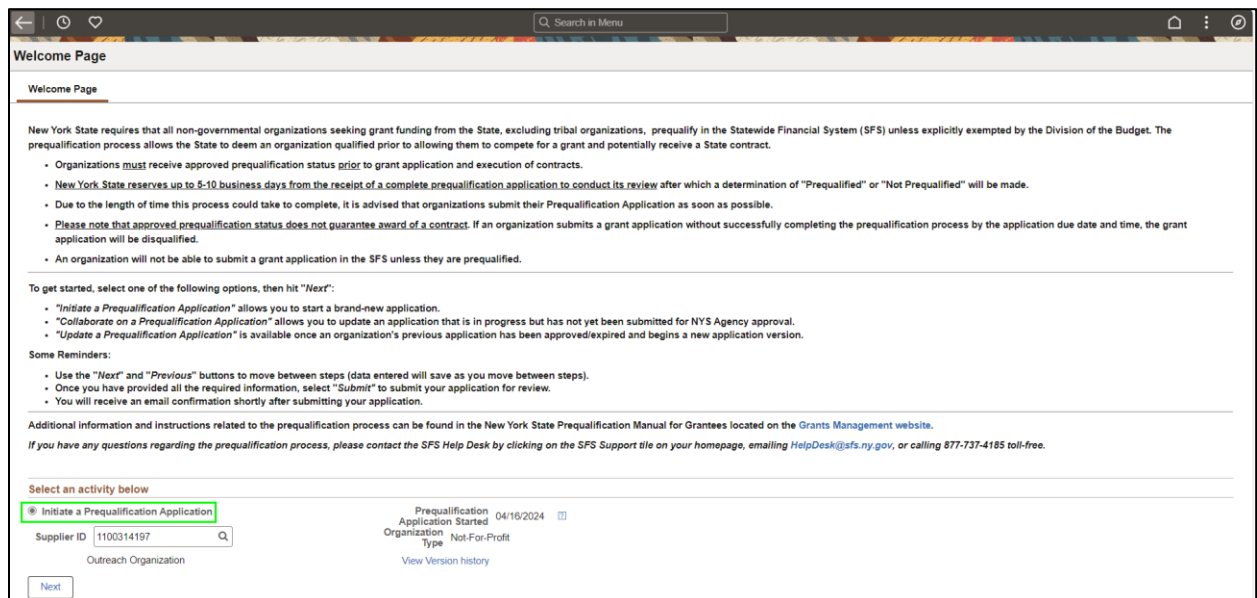


Step	Action
4.	Preferred Navigation: Click the Grant Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > Prequalification.

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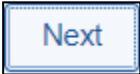
Step	Action
5.	Click the Prequalification Application tile.



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Step	Action
6.	On the Welcome Page, your Supplier ID is defaulted based on your user credentials, as well as your Organization Type. You are presented with one of the following options: • Initiate a Prequalification Application: allows you to start a brand-new application. This option only displays for application version 1. ◦ Note: Application version 1 represents the grantee's initial prequalification application with no prior versions in SFS. • Collaborate on a Prequalification Application: allows you to update an application that is in progress but has not yet been submitted for NYS Agency approval. • Update a Prequalification Application: is available once an organization's previous application has been approved/expired and begins a new application version. Select the applicable option under the Select an Activity Below text.

The screenshot shows the 'Welcome Page' of the SFS system. It contains a search bar at the top, a 'Welcome Page' header, and a main content area with a paragraph of text and a bulleted list. Below this is a section titled 'To get started, select one of the following options, then hit "Next"'. This section contains three bullet points: 'Initiate a Prequalification Application', 'Collaborate on a Prequalification Application', and 'Update a Prequalification Application'. Below these is a 'Some Reminders:' section with three bullet points. At the bottom, there is a 'Select an activity below' section with a radio button selected for 'Initiate a Prequalification Application'. To the right of this, there is a 'Prequalification' section showing 'Application Started: 04-10-2024' and 'Organization Type: Not For Profit'. Below this is a 'Supplier ID' field with the value '100214107' and a 'Next' button highlighted with a green box.

Step	Action
7.	Click the Next button. 

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Prequalification Application

Not-for-profit organizations must answer the following questions designed to provide State agencies with the information needed to make informed prequalification determinations.

Supplier ID: 1100314197
[Supplier Information](#)
 Supplier Name: Outreach Organization
 Email ID: test123@sfs.ny.gov

Prequalification Status: Application In Progress
 Prequalification Expiration Date
 Organization Type: Not-For-Profit

Version: 1
[View Version History](#)
 Application ID: 00007462

State Agency:

Tax Year End Date: (MM/DD)

Profile Questions

1) Within the past five years, have you, the organization, and/or any organization affiliate:
 a. Been suspended or debarred from any contracting process or been disqualified on any government procurement?
 If yes, identify the government entity/owner(s) involved, project(s), contract number(s), relevant dates and any remedial or corrective action(s) taken and the current status of the issue(s).

Explanation/Comments:

Step	Action
8.	Enter the agency business unit that you expect to do business with into the State Agency field or click the magnifying glass icon to look up the information. If you are unsure of the business unit for the State Agency you expect to do business with, click the magnifying glass to view a list of business units and state agencies. 

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Cancel

Lookup

Search for: State Agency

Search Criteria

Business Unit (begins with)

Search

Clear

Show Operators

Search Results

31 rows

Business Unit ↑↓	State Agency Name ↑↓
DOT01	Department of Transportation
DVA01	Office of Veterans' Affairs
ESD01	Empire State Development
GTS01	Governor's Traffic Safety Committee
HCR01	NYS Homes and Community Renewal
HES01	Higher Education Services Corporation
IOL01	Interest on Lawyers Account
JUS01	Justice Center
OAS01	Office of Addiction Services and Supports
OFA01	Office for the Aging
OLS01	Office of Indigent Legal Services
OMH01	Office of Mental Health
OPD01	Office for People with Developmental Disabilities
OVS01	Office of Victim Services

Step	Action
9.	Click the scrollbar to scroll through the list of agencies and select the business unit associated to the state agency that you expect to do business with. Note: You can change the agency's business unit up until the prequalification application is initially submitted. Once submitted, if you need to change the agency's business unit, you will need to contact the SFS Help Desk at helpdesk@sfs.ny.gov or (877) 737-4185 (toll-free) or (518) 457-7737.

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Prequalification Application

Not-for-profit organizations must answer the following questions designed to provide State agencies with the information needed to make informed prequalification determinations.

Supplier ID: 1100314197
Supplier Information
Supplier Name: Outreach Organization
Email ID: test123@sfs.ny.gov

Prequalification Status: Application In Progress
Version: 1
Prequalification Expiration Date
Organization Type: Not-For-Profit
State Agency: OMH01
Office of Mental Health
Tax Year End Date (MM/DD)

Profile Questions

1) Within the past five years, have you, the organization, and/or any organization affiliate:
a. Been suspended or debarred from any contracting process or been disqualified on any government procurement?
If yes, identify the government entity/owner(s) involved, project(s), contract number(s), relevant dates and any remedial or corrective action(s) taken and the current status of the issue(s).

Explanation/Comments

Step	Action
10.	Enter the applicable tax year end date (format MM/DD) into the Tax Year End Date field.

Prequalification Application

Profile Questions

1) Within the past five years, have you, the organization, and/or any organization affiliate:
a. Been suspended or debarred from any contracting process or been disqualified on any government procurement?
If yes, identify the government entity/owner(s) involved, project(s), contract number(s), relevant dates and any remedial or corrective action(s) taken and the current status of the issue(s).

Explanation/Comments

2) Within the past five years, have you, the organization, and/or any organization affiliate:
b. Been subject to a denial or revocation of a government prequalification?
If yes, identify the government entity/owner(s) involved, project(s), contract number(s), relevant dates and any remedial or corrective action(s) taken and the current status of the issue(s).

Explanation/Comments

3) Within the past five years, have you, the organization, and/or any organization affiliate:
c. Been denied a contract or had a bid rejected based upon a finding of non-responsibility by a government entity?
If yes, provide a brief description of the circumstances of such incident(s) and any remedial or corrective action(s) taken and the current status of the issue(s).

Explanation/Comments

Step	Action
11.	Organizations must complete an online Prequalification application in SFS which includes answering Profile Questions regarding the organization and uploading key organizational documents. Note: Questions may vary based on your Organization Type .

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Step	Action
12.	Complete the Questions by clicking the applicable drop-down list and selecting either Yes or No. Note: Some questions may ask for additional explanation depending on your answer. If so, add your explanation in the Explanation/Comments field as appropriate.

The screenshot shows a web application titled "Prequalification Application". On the left is a sidebar with navigation links: "Organization Information" (marked as "Visited"), "Required Documents" (with a "Not Started" radio button), "Contacts" (with a "Not Started" radio button), and "Submit" (with a "Not Started" radio button). The main content area contains three questions:

- Question 14:** "Does your organization have all the following policies in place?" followed by a list: Anti-nepotism policy, Staff code of conduct, Board of Directors Conflict of Interest Policy, Conflict of Interest Policy, Diversity Policy, and Fiscal/Internal Controls Policy. To the right is an "Explanation/Comments" field with a dropdown arrow.
- Question 15:** "Does your organization have a written and posted Equal Employment Opportunity (EEO) policy? If your organization is not subject to the EEO posted policy requirement, please choose N/A." To the right is a "List Item" field with a magnifying glass icon highlighted by a green box.
- Question 16:** "Last year, did a quorum of the board of directors meet in compliance with the organization's bylaws?" To the right is an "Explanation/Comments" field with a dropdown arrow.

A "Next >" button is located in the top right corner of the form area.

Step	Action
13.	Complete questions shown as List Item by selecting the magnifying glass which is question 15 in this example. Note: There are two list item questions (questions 15 and 18).

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Prequalification Application

Organization Information (Visited)

Required Documents (Not Started)

Contacts (Not Started)

Submit (Not Started)

14) Does your organization have all the following policies?
 Anti-nepotism policy
 Staff code of conduct
 Board of Directors Conflict of Interest Policy
 Conflict of Interest Policy
 Diversity Policy
 Fiscal/Internal Controls Policy

15) Does your organization have a written and posted policy that your organization is not subject to the EEO posted?

List Options

List Values

List Line Number	Policy Type
1	Yes
2	No
3	N/A

Return

Step	Action
14.	Select one of the options from List Options .
15.	Click Return .

Prequalification Application

Organization Information (Visited)

Required Documents (Not Started)

Contacts (Not Started)

Submit (Not Started)

17) Does your board of directors take minutes of all meetings and maintain records of such meetings consistent with its bylaws?

Explanation/Comments

18) Indicate all of the items the board of directors reviews and/or approves. If your board reviews some but not all of these items, please explain.

List Item

Comments

Step	Action
16.	Complete questions shown as List Item by selecting the magnifying glass which is question 18 in this example.

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List Options		
List Values		
List Line Number ↑↓	Select ↑↓	Policy Type ↑↓
1	Yes ☐	Annual Operating Budget
2	Yes ☐	Policies and Procedures
3	Yes ☐	Executive Performance and Compensation
4	Yes ☐	Fundraising Plan
5	Yes ☐	Internal Controls
6	Yes ☐	Fiscal Controls
7	Yes ☐	Annual Audit
8	Yes ☐	Form 990
9	Yes ☐	Program Operations and Performance Outcomes
10	Yes ☐	Other (Please add details to Comment box at bottom of page)

[Return](#)

Step	Action
17.	Select Yes for all the items your board reviews and/or approves.
18.	Click Return .

X Exit

Prequalification Application

Next >

Organization Information

Required Documents

Contacts

Submit

17) Does your board of directors take minutes of all meetings and maintain records of such meetings consistent with its bylaws?

Yes

Explanation/Comments

18) Indicate all of the items the board of directors reviews and/or approves. If your board reviews some but not all of these items, please explain.

List Item

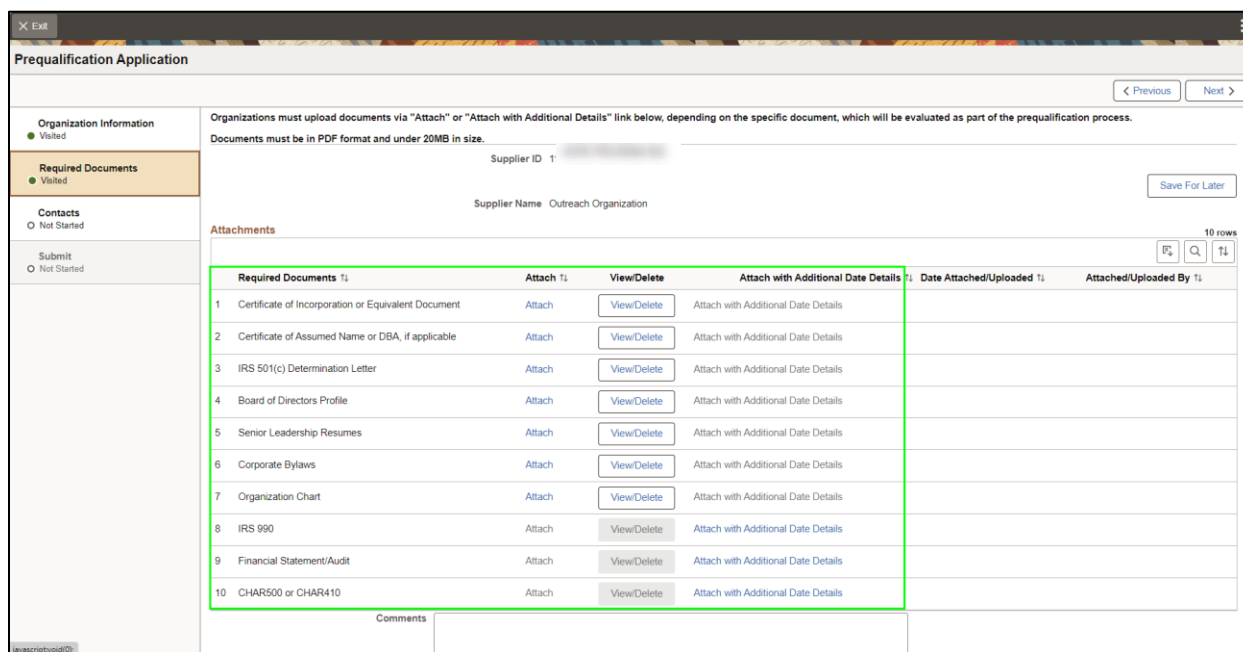
Annual Operating Budget, Policies and Procedures, Executive Performance and Compensation, Fundraising Plan, Internal Controls, Fiscal Controls, Annual Audit, Form 990, Program Operations and Performance

Comments

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Step	Action
19.	Enter any additional comments that you want the agency to see, in the Comments field located at the bottom of the page. Note: The Comments field could also be used to explain why your organization reviews some, but not all of the items listed in question 18.
20.	Click the Next button. 



Prequalification Application

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID: [Redacted]

Supplier Name: Outreach Organization

Attachments

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details		
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments

Step	Action
21.	The Required Documents page is where you will upload the required documents for the agency to review.
22.	On the Required Documents page: - All attachments must be in PDF format. Uploading any other document types will result in automatic deletion by the system. - All rows must have an attachment uploaded for the Submit button to appear on the Prequalification application. - Only one attachment per required document category is allowed. If you have multiple attachments for a document category, then you will need to merge the documents into a single document prior to uploading. - You may need to scroll to see all the documents.

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Prequalification Application

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID: 1100314197

Supplier Name: Outreach Organization

Save For Later

Attachments

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details		
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments

Step	Action
23.	To add an attachment, click the Attach link. Note: If you have previously prequalified in SFS and are renewing your prequalification, all Required Documents which have an active Attach link (documents 1-7) will carry over from your previous prequalification. After selecting the Attach link, click on the file name to review each document from the previous version. If no changes are needed, you can skip to Step 31 in this procedure. If changes are needed to any documents, you can click the delete (-) button to remove the document and upload an updated version by following Step 24 onward.

Prequalification Application

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID: 1100314197

Supplier Name: Outreach Organization

Save For Later

Attachments

Required Documents

1 Certificate of Incorporation or Equivalent Document

2 Certificate of Assumed Name or DBA, if applicable

3 IRS 501(c) Determination Letter

4 Board of Directors Profile

5 Senior Leadership Resumes

6 Corporate Bylaws

7 Organization Chart

8 IRS 990

9 Financial Statement/Audit

10 CHAR500 or CHAR410

Cancel Add Attachment Done

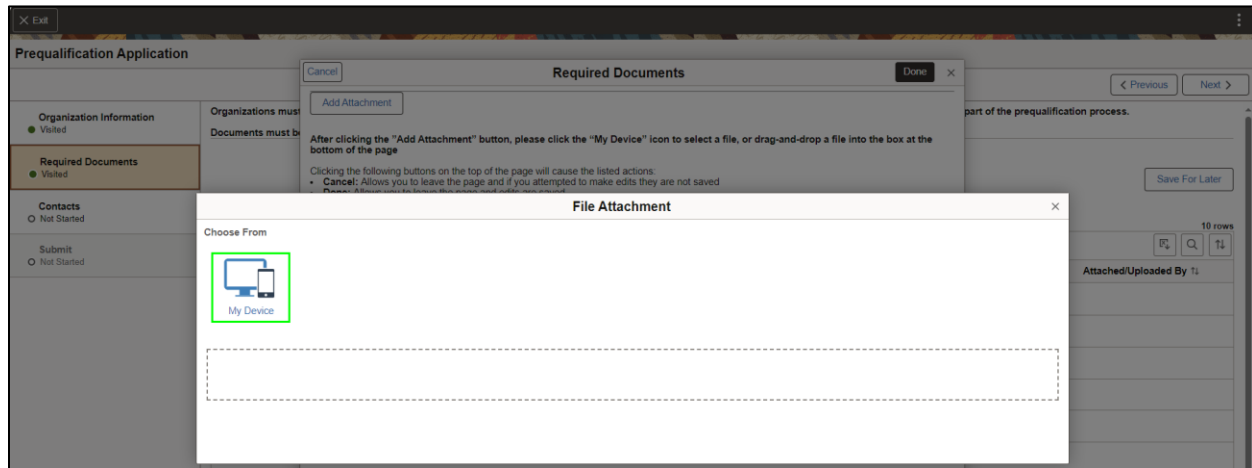
After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

Clicking the following buttons on the top of the page will cause the listed actions:

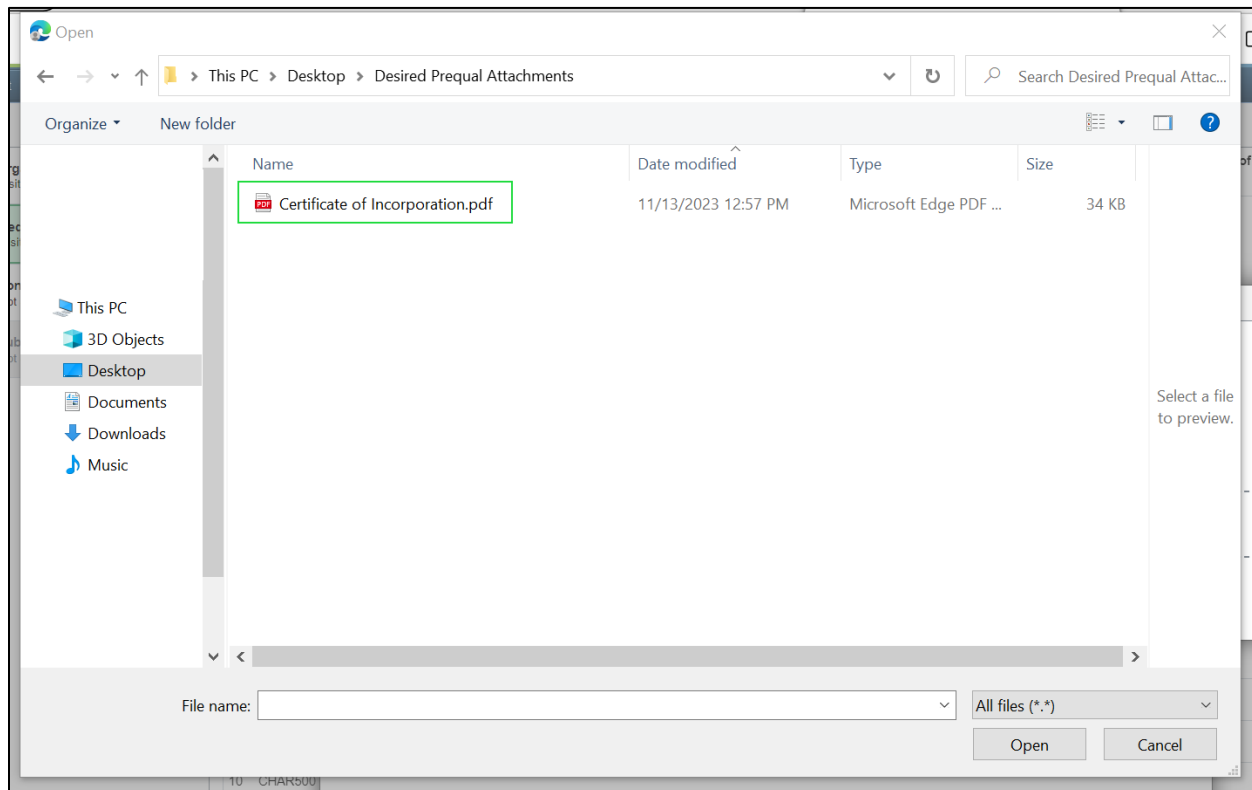
- Cancel: Allows you to leave the page and if you attempted to make edits they are not saved
- Done: Allows you to leave the page and edits are saved
- X: Closes out the page without saving changes

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Step	Action
24.	Click the Add Attachment button. 

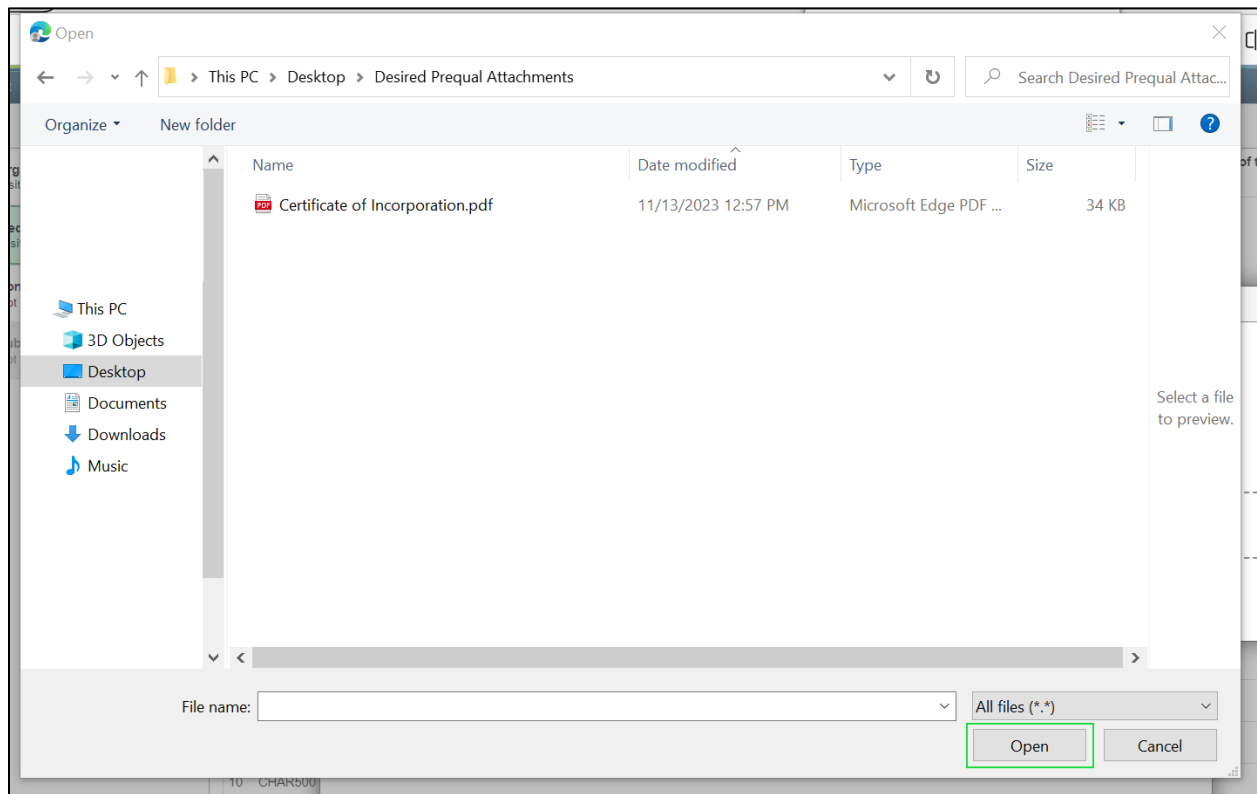


Step	Action
25.	Click the My Device button.



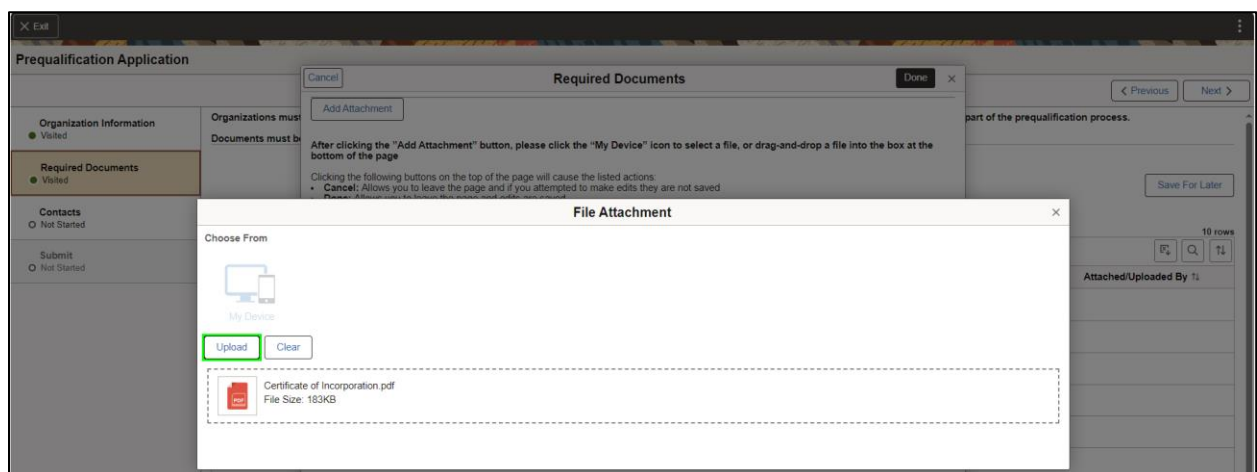
SFS Handbook: Grantee Processing in SFS

Step	Action
26.	Navigate to the directory location and select the applicable document for attachment.

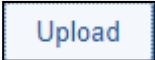


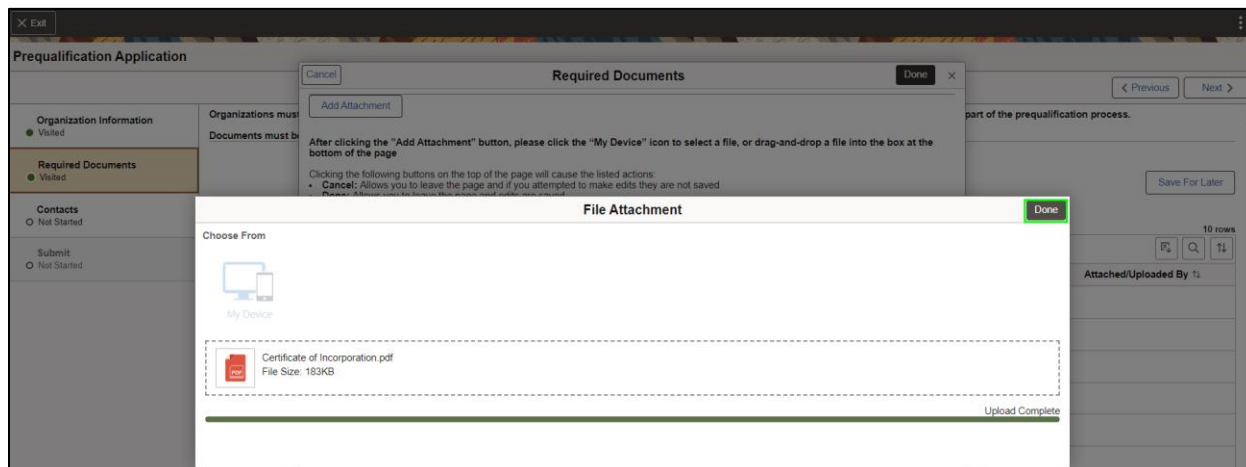
Step	Action
27.	Click the Open button.

Open

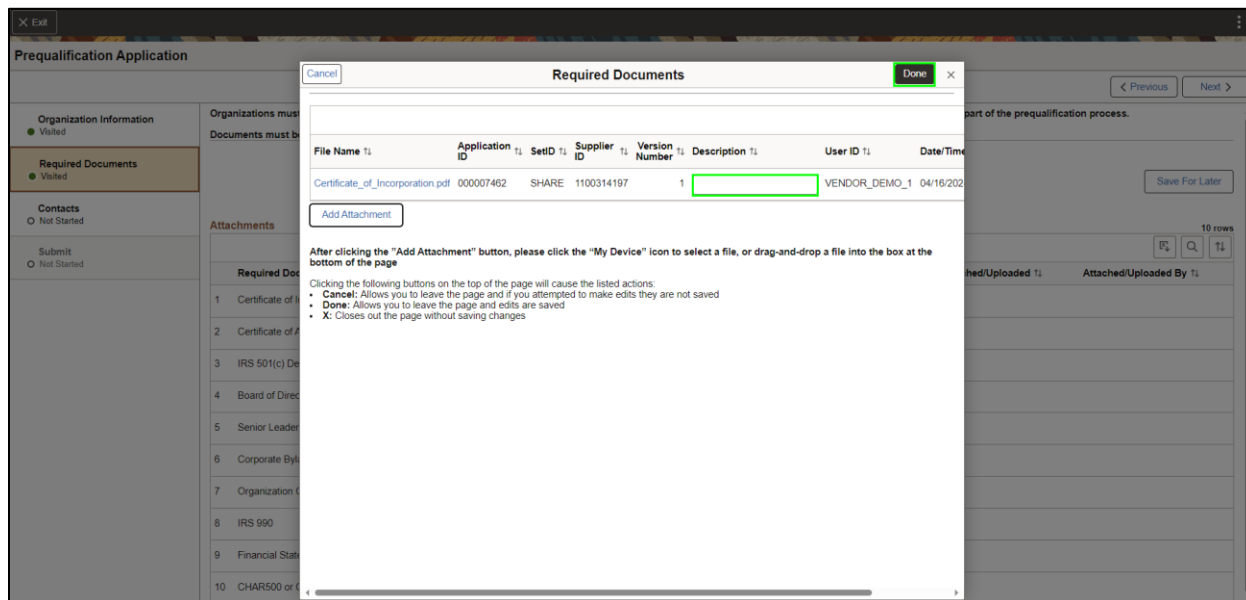


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Step	Action
28.	Click the Upload button. 



Step	Action
29.	Click the Done button. 



Step	Action
30.	Enter the applicable value in the Description field which should describe the document that was just attached. Note: This description will be visible to both agency and grantee.

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Step	Action
31.	Click the Done button.

Prequalification Application

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID: 1100314197

Supplier Name: Outreach Organization

Attachments

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details	04/16/2024 1:51:08PM	
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments

Step	Action
32.	Follow the same process to add attachments for any additional rows, using the Attach link.

Prequalification Application

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID: 1100314197

Supplier Name: Outreach Organization

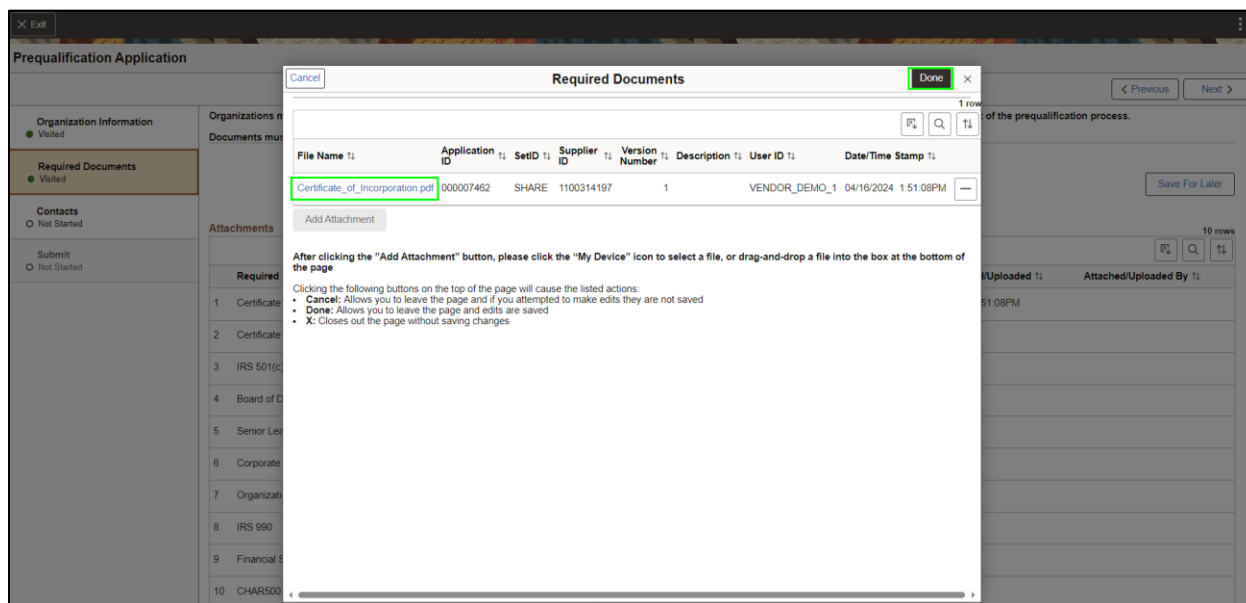
Attachments

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details	04/16/2024 1:51:08PM	
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments

SFS Handbook: Grantee Processing in SFS

Step	Action
33.	To view an existing attachment, click the View/Delete button. Note: If the View/Delete button is not active, then a document hasn't been attached.



Step	Action
34.	To open the attachment, click the File Name link. In this example, we will not open the linked attachment.
35.	When you are finished viewing attachments, click the Done button. Done

SFS Handbook: Grantee Processing in SFS

Prequalification Application

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID: 1100314197

Supplier Name: Outreach Organization

Attachments

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details	04/16/2024 1:51:08PM	VENDOR_DEMO_1
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments

Step	Action
36.	Note: Not for Profit Organizations must upload IRS 990 information. To do this, use the Attach with Additional Date Details link.

Prequalification Application

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID: 1100314197

Supplier Name: Outreach Organization

Attachments

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details	04/16/2024 1:51:08PM	VENDOR_DEMO_1
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments

Step	Action
37.	Click the Attach with Additional Date Details link.

SFS Handbook: Grantee Processing in SFS

Cancel

Attach with Additional Date Details

Done

IRS990 General Instructions

- Nonprofits must upload their most recent IRS990. If an organization has yet to file its initial IRS990 it should upload a statement detailing the date it was established and the tax year to be covered by the first filing.
- Enter the Tax Year Begin and End dates and the Date Next 990 Due Field will automatically populate.
- Nonprofits that are exempt from filing an annual IRS990 should upload proof of exemption and enter the Begin and End date of their current tax year. Prequalification Specialists will evaluate the documentation and set the Exempt flag accordingly.

CHAR500 or CHAR410 General Instructions

- Nonprofits must upload their most recent Annual Filing for Charitable Organizations (CHAR500) or Documentation of Exemption from the NYS Charities Bureau. If an Organization has not filed its first CHAR500, it should upload the Registration Statement for Charitable Organization.
- Enter the Tax Year Begin and End dates and the Date Next Filing Due field will automatically populate.
- Nonprofits that are exempt from filing should upload proof of exemption and enter the Begin and End date of their current tax year.
- Prequalification Specialists will evaluate the documentation and set the Exempt flag accordingly.

Audit/Review & Findings General Instructions

- Nonprofits must upload their most recent CPA review, Independent Audit, or A133 Audit and any material findings. If an organization does not have any of these documents, it should upload a copy of the current and prior years budget.
- Enter the Tax Year Begin and End dates for the period covered by the most recent audit and the Date Next Due field automatically populate.

Clicking the following buttons on the top of the page will cause the listed actions:

- Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- Done:** Allows you to leave the page and edits are saved
- X:** Closes out the page without saving changes

After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

1 row

View T1

Application ID T1

Version Number T1

SetID T1

Supplier ID T1

View

Add Attachment

Step	Action
38.	Review the instructions for Upload as they apply to your Organization Type and then use the Add Attachment button to add the relevant documentation. Note: All attachments must be in PDF format. Uploading any other document types will result in automatic deletion by the system.

Cancel

Attach with Additional Date Details

Done

IRS990 General Instructions

- Nonprofits must upload their most recent IRS990. If an organization has yet to file its initial IRS990 it should upload a statement detailing the date it was established and the tax year to be covered by the first filing.
- Enter the Tax Year Begin and End dates and the Date Next 990 Due Field will automatically populate.
- Nonprofits that are exempt from filing an annual IRS990 should upload proof of exemption and enter the Begin and End date of their current tax year. Prequalification Specialists will evaluate the documentation and set the Exempt flag accordingly.

CHAR500 or CHAR410 General Instructions

- Nonprofits must upload their most recent Annual Filing for Charitable Organizations (CHAR500) or Documentation of Exemption from the NYS Charities Bureau. If an Organization has not filed its first CHAR500, it should upload the Registration Statement for Charitable Organization.
- Enter the Tax Year Begin and End dates and the Date Next Filing Due field will automatically populate.
- Nonprofits that are exempt from filing should upload proof of exemption and enter the Begin and End date of their current tax year.
- Prequalification Specialists will evaluate the documentation and set the Exempt flag accordingly.

Audit/Review & Findings General Instructions

- Nonprofits must upload their most recent CPA review, Independent Audit, or A133 Audit and any material findings. If an organization does not have any of these documents, it should upload a copy of the current and prior years budget.
- Enter the Tax Year Begin and End dates for the period covered by the most recent audit and the Date Next Due field automatically populate.

Clicking the following buttons on the top of the page will cause the listed actions:

- Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- Done:** Allows you to leave the page and edits are saved
- X:** Closes out the page without saving changes

After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

1 row

View T1

Application ID T1

Version Number T1

SetID T1

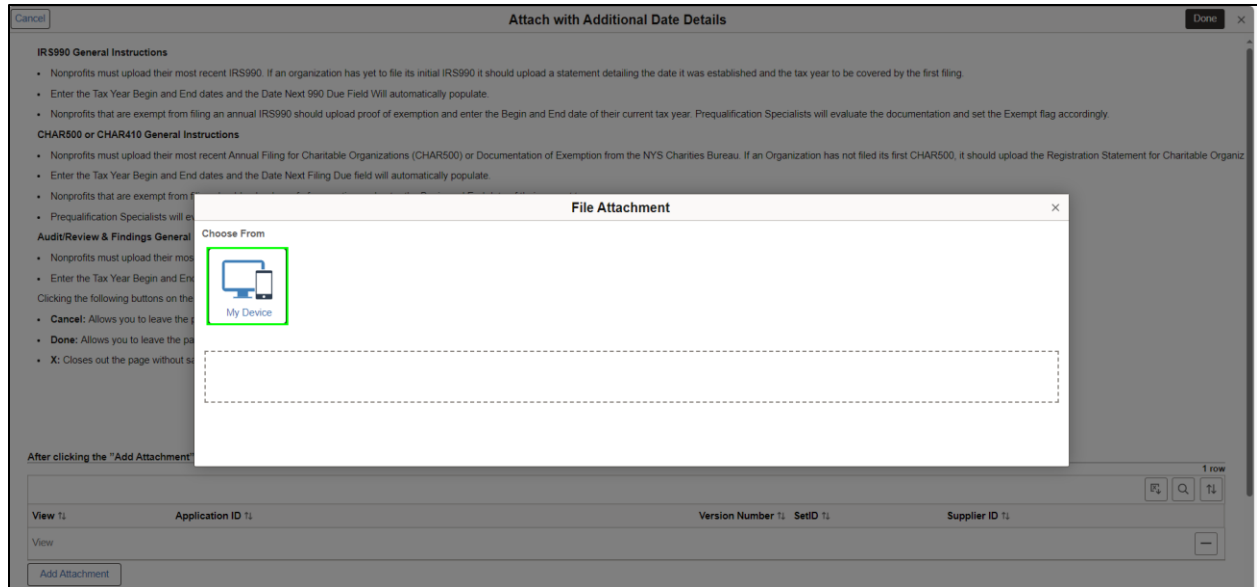
Supplier ID T1

View

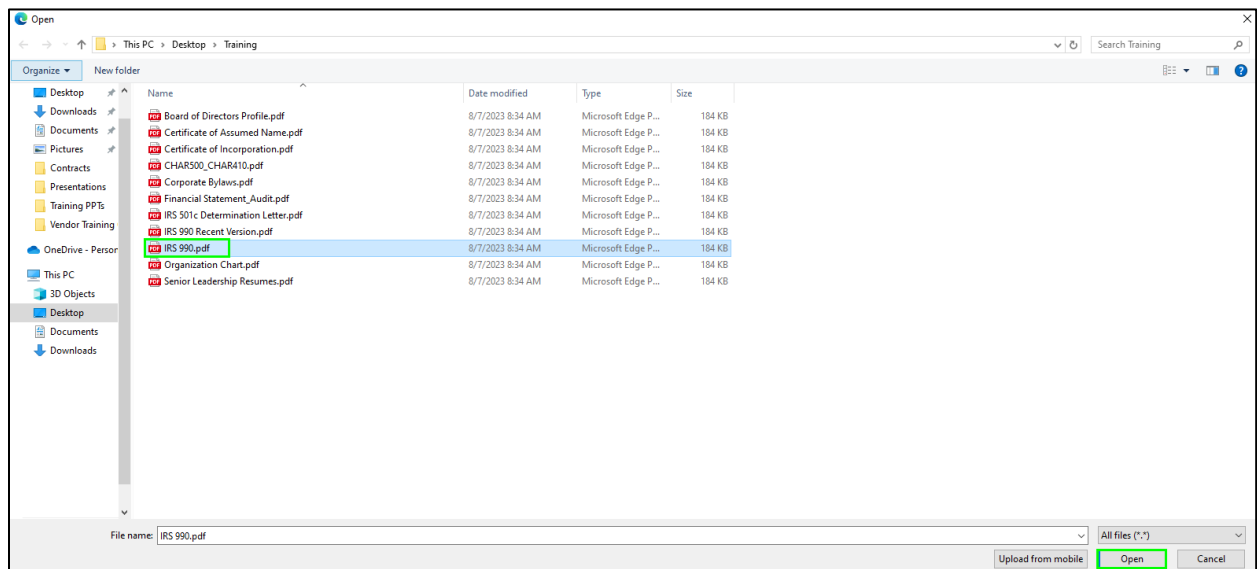
Add Attachment

Step	Action
39.	Click the Add Attachment button.

SFS Handbook: Grantee Processing in SFS

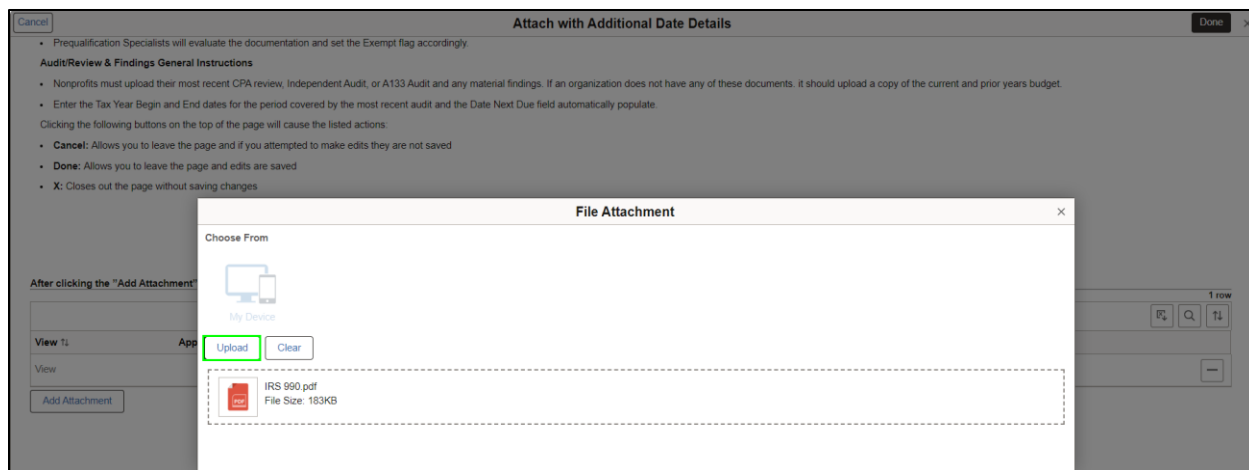


Step	Action
40.	Click the My Device button.

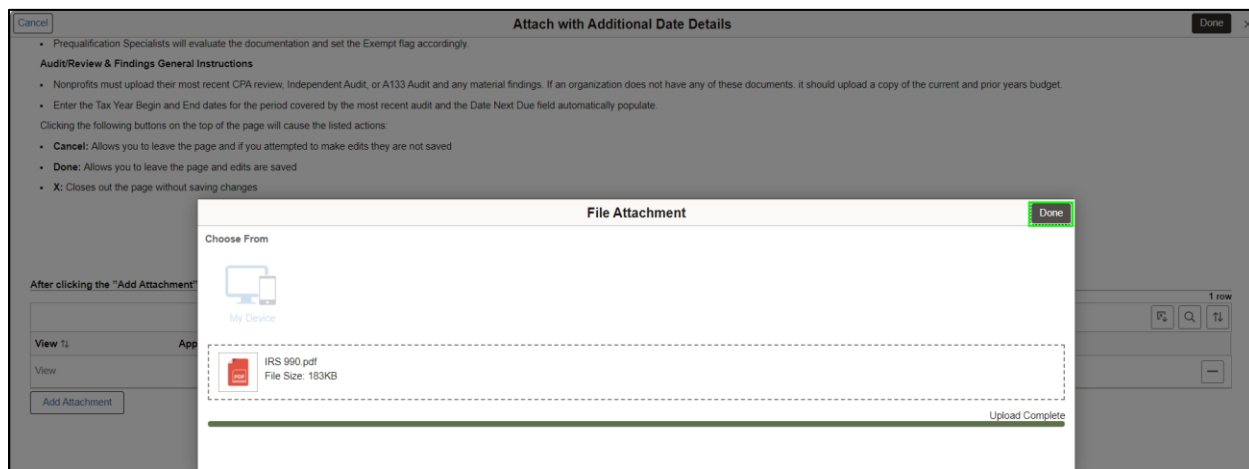
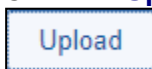


Step	Action
41.	Navigate to the directory location and select the applicable document for attachment.
42.	Click the Open button.

SFS Handbook: Grantee Processing in SFS



Step	Action
43.	Click the Upload button.



Step	Action
44.	Click the Done button.



SFS Handbook: Grantee Processing in SFS

Cancel

Attach with Additional Date Details

Done

- Prequalification Specialists will evaluate the documentation and set the Exempt flag accordingly.

Audit/Review & Findings General Instructions

- Nonprofits must upload their most recent CPA review, Independent Audit, or A133 Audit and any material findings. If an organization does not have any of these documents, it should upload a copy of the current and prior years budget.
- Enter the Tax Year Begin and End dates for the period covered by the most recent audit and the Date Next Due field automatically populate.

Clicking the following buttons on the top of the page will cause the listed actions:

- Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- Done:** Allows you to leave the page and edits are saved
- X:** Closes out the page without saving changes

After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

IRS_990.pdf	Application ID	Version Number	SetID	Supplier ID
IRS_990.pdf	000007462	1	SHARE	1100314197

Add Attachment

Date Next Due

Tax Year Begin Date

State Adjusted Due Date

Tax Year End Date

State Adjusted Due Date Reason

Step	Action
45.	Enter the applicable date (format MM/DD/YYYY) in the Tax Year Begin Date field or click the Calendar icon to select the date.
46.	Enter the applicable date (format MM/DD/YYYY) in the Tax Year End Date field or click the Calendar icon to select the date.
47.	Click the Done button.

X Exit

Prequalification Application

< Previous

Next >

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID 1100314197

Supplier Name Outreach Organization

Organization Information

Required Documents

Contacts

Submit

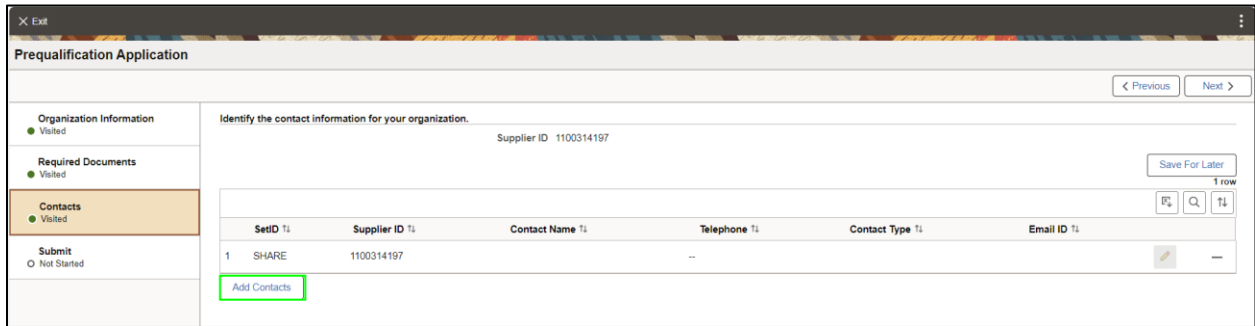
Attachments

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details	04/16/2024 1:51:08PM	VENDOR_DEMO_1
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details	04/16/2024 4:13:27PM	
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments

SFS Handbook: Grantee Processing in SFS

Step	Action
48.	Follow the same process to add attachments for any additional rows with the Attach with Additional Date Details link.
49.	Click the Next button. 



Prequalification Application

Identify the contact information for your organization.

Supplier ID 1100314197

Save For Later

SetID	Supplier ID	Contact Name	Telephone	Contact Type	Email ID
1	SHARE	1100314197	--		

Add Contacts

Step	Action
50.	Click the Add Contacts button to add a contact person from your organization who should receive email notifications regarding the prequalification application and who the agency can contact if they have questions about the prequalification application.  Note: There will be system email notifications to the grantee contact(s) when their prequalification application is Submitted, Approved, Requested for More Information, Expired, or Due to Expire.

SFS Handbook: Grantee Processing in SFS

CancelAdd New ContactDone ×

Contact Information

Description

* First Name

* Last Name

Title

*Email Id

*Telephone

(Enter 10 digit ###-###-#### Phone #)

Fax Number

Contact Type

Clicking the following buttons on the top of the page will cause the listed actions:

- **Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- **Done:** Allows you to leave the page and edits are saved
- **X:** Closes out the page without saving changes

Step	Action
51.	Enter the applicable value in the Description field. This can be a description of the contact, such as Prequal Contact. If your organization will have multiple contacts, you want to consider Primary Prequal Contact or Secondary Prequal Contact.

CancelAdd New ContactDone ×

Contact Information

Description

* First Name

* Last Name

Title

*Email Id

*Telephone

(Enter 10 digit ###-###-#### Phone #)

Fax Number

Contact Type

Clicking the following buttons on the top of the page will cause the listed actions:

- **Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- **Done:** Allows you to leave the page and edits are saved
- **X:** Closes out the page without saving changes

SFS Handbook: Grantee Processing in SFS

Step	Action
52.	Enter the applicable value in the First Name field.
53.	Enter the applicable value in the Last Name field.
54.	Enter the applicable value in the Email Id field.
55.	Enter the applicable value in the Telephone field.

Cancel

Add New Contact

Done X

Contact Information

Description

* First Name

* Last Name

Title

*Email Id

*Telephone
(Enter 10 digit ###-###-#### Phone #)

Fax Number

Contact Type

Clicking the following buttons on the top of the page will cause the listed actions:

- **Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- **Done:** Allows you to leave the page and edits are saved
- **X:** Closes out the page without saving changes

Step	Action
56.	The Title , Fax Number , and Contact Type fields are optional, and can be populated or left blank.

SFS Handbook: Grantee Processing in SFS

Add New Contact

Contact Information

Description

* First Name

* Last Name

Title

*Email Id

*Telephone
(Enter 10 digit ###-###-#### Phone #)

Fax Number

Contact Type

Clicking the following buttons on the top of the page will cause the listed actions:

- Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- Done:** Allows you to leave the page and edits are saved
- X:** Closes out the page without saving changes

Step	Action
57.	Click the Done button. Done

Prequalification Application

Identify the contact information for your organization.

Supplier ID 1100314197

Save For Later

1 row

SetID	Supplier ID	Contact Name	Telephone	Contact Type	Email ID
1	SHARE	1100314197	Jane Doe	518-245-9879	tst@tst.com

Step	Action
58.	Multiple contacts can be added. If needed, click the Add Contacts button and follow steps 51-57 to add additional prequalification contacts from your organization.
59.	Click the Next button. Next

SFS Handbook: Grantee Processing in SFS

Prequalification Application

Organization Information
● Visited

Required Documents
● Visited

Contacts
● Visited

Submit
● Visited

Select the "Review" button to review the Prequalification information.

Click the "Submit" button to submit your Prequalification application after reviewing and attesting the information entered for your organization is correct.

Email Communication regarding application will be sent to:
tst@tst.com ;

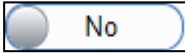
Attestation

By selecting "Yes" below, I certify: - I am authorized on behalf of the applicant and/or its governing body to submit this information. - All of the information contained herein and all statements, data and supporting documents which have been made or furnished, are true and correct and complete to the best of my knowledge and belief. - I recognize that this questionnaire is submitted for the express purpose of assisting New York State in making responsibility determinations regarding an award of contracts or grants or approval of a subcontract. - I acknowledge that New York State will rely on such information disclosed by me. - I acknowledge that New York State may, in its discretion, by means which it may so choose, verify the truth and accuracy of all statements made herein. - I understand that if any change occurs in the information I have provided, that I will promptly notify the State of such changes and that failure to notify the State of such changes will constitute cause of disapproval of any application or revocation of any agreement made with the State. - I understand that any false statement or misrepresentation will constitute cause for disapproval of any application or revocation of any agreement made with the State upon which such information was relied. - I further acknowledge that my submission of this document, knowing that it contains a false statement or false information, constitutes a crime under New York State law, and that, I may be prosecuted and be subject to a fine and/or a term of imprisonment if so convicted of such a crime.

By selecting "Yes" below, I certify: I am authorized on behalf of the applicant and/or its governing body to submit this information.

☒ Yes ☐ No

[Review](#) [Submit](#)

Step	Action
60.	On the Submit page, you certify that you are authorized to submit the information on the prequalification application and submit the prequalification application for agency review. You also have the option to review the information that you entered on the application, prior to submitting. To certify, click the Attestation toggle option to Yes.  Note: If you made additional changes to the application after clicking Yes, then you will need to reset the application before submitting by toggling back to No and then back to Yes.

Prequalification Application

Organization Information
● Visited

Required Documents
● Visited

Contacts
● Visited

Submit
● Visited

Select the "Review" button to review the Prequalification information.

Click the "Submit" button to submit your Prequalification application after reviewing and attesting the information entered for your organization is correct.

Email Communication regarding application will be sent to:
tst@tst.com ;

Attestation

By selecting "Yes" below, I certify: - I am authorized on behalf of the applicant and/or its governing body to submit this information. - All of the information contained herein and all statements, data and supporting documents which have been made or furnished, are true and correct and complete to the best of my knowledge and belief. - I recognize that this questionnaire is submitted for the express purpose of assisting New York State in making responsibility determinations regarding an award of contracts or grants or approval of a subcontract. - I acknowledge that New York State will rely on such information disclosed by me. - I acknowledge that New York State may, in its discretion, by means which it may so choose, verify the truth and accuracy of all statements made herein. - I understand that if any change occurs in the information I have provided, that I will promptly notify the State of such changes and that failure to notify the State of such changes will constitute cause of disapproval of any application or revocation of any agreement made with the State. - I understand that any false statement or misrepresentation will constitute cause for disapproval of any application or revocation of any agreement made with the State upon which such information was relied. - I further acknowledge that my submission of this document, knowing that it contains a false statement or false information, constitutes a crime under New York State law, and that, I may be prosecuted and be subject to a fine and/or a term of imprisonment if so convicted of such a crime.

By selecting "Yes" below, I certify: I am authorized on behalf of the applicant and/or its governing body to submit this information.

☒ Yes ☐ No

[Review](#) [Submit](#)

Step	Action
61.	If you are interested in reviewing all the information that you entered on the application, before you submit, click the Review button. In this example, we will not click the review button. Note: This is an optional step.
62.	Note: If you need to update information entered on the previous sections, select the applicable section from the list on the left side of the page and make the update(s).

SFS Handbook: Grantee Processing in SFS

Prequalification Application

Select the "Review" button to review the Prequalification information.

Click the "Submit" button to submit your Prequalification application after reviewing and attesting the information entered for your organization is correct.

Email Communication regarding application will be sent to:
tst@tst.com ;

Attestation

By selecting "Yes" below, I certify: - I am authorized on behalf of the applicant and/or its governing body to submit this information. - All of the information contained herein and all statements, data and supporting documents which have been made or furnished, are true and correct and complete to the best of my knowledge and belief. - I recognize that this questionnaire is submitted for the express purpose of assisting New York State in making responsibility determinations regarding an award of contracts or grants or approval of a subcontract. - I acknowledge that New York State will rely on such information disclosed by me. - I acknowledge that New York State may, in its discretion, by means which it may so choose, verify the truth and accuracy of all statements made herein. - I understand that if any change occurs in the information I have provided, that I will promptly notify the State of such changes and that failure to notify the State of such changes will constitute cause of disapproval of any application or revocation of any agreement made with the State upon which such information was relied. - I further acknowledge that my submission of this document, knowing that it contains a false statement or false information, constitutes a crime under New York State law, and that, I may be prosecuted and be subject to a fine and/or a term of imprisonment if so convicted of such a crime.

By selecting "Yes" below, I certify: I am authorized on behalf of the applicant and/or its governing body to submit this information.

☐ Yes ☐ No

[Review](#) [Submit](#)

Step	Action
63.	To submit the application for agency review, click the Submit button.

Submit Prequalification Page

Pending Editor Review

✓ You have Successfully completed your Prequalification Application

Supplier Name: Outreach Organi

Any email regarding the Prequalification status will be sent to:
tst@tst.com ;

[Return to Prequalification Welcome page](#)

[Return to Supplier homepage](#)

Step	Action
64.	The application is routed for review to the agency you selected in the State Agency field, on the Organization Information section.
	Note: There will be system email notifications to the contact(s) listed in the Contacts section when the prequalification application is Submitted, Approved by the agency, or returned by the agency for more information.
65.	To return to the Prequalification Welcome page, click the Return to Prequalification Welcome page link or click the Home icon in the upper right corner of the page to return to the SFS Vendor Portal homepage.

SFS Handbook: Grantee Processing in SFS

Welcome Page

Welcome Page

New York State requires that all non-governmental organizations seeking grant funding from the State, excluding tribal organizations, prequalify in the Statewide Financial System (SFS) unless explicitly exempted by the Division of the Budget. The prequalification process allows the State to deem an organization qualified prior to allowing them to compete for a grant and potentially receive a State contract.

- Organizations **must** receive approved prequalification status **prior** to grant application and execution of contracts.
- New York State reserves up to 5-10 business days from the receipt of a complete prequalification application to conduct its review after which a determination of "Prequalified" or "Not Prequalified" will be made.
- Due to the length of time this process could take to complete, it is advised that organizations submit their Prequalification Application as soon as possible.
- Please note that approved prequalification status does not guarantee award of a contract. If an organization submits a grant application without successfully completing the prequalification process by the application due date and time, the grant application will be disqualified.
- An organization will not be able to submit a grant application in the SFS unless they are prequalified.

To get started, select one of the following options, then hit "Next":

- "Initiate a Prequalification Application" allows you to start a brand-new application.
- "Collaborate on a Prequalification Application" allows you to update an application that is in progress but has not yet been submitted for NYS Agency approval.
- "Update a Prequalification Application" is available once an organization's previous application has been approved/expired and begins a new application version.

Some Reminders:

- Use the "Next" and "Previous" buttons to move between steps (data entered will save as you move between steps).
- Once you have provided all the required information, select "Submit" to submit your application for review.
- You will receive an email confirmation shortly after submitting your application.

Additional information and instructions related to the prequalification process can be found in the New York State Prequalification Manual for Grantees located on the [Grants Management website](#).

If you have any questions regarding the prequalification process, please contact the SFS Help Desk by clicking on the SFS Support tile on your homepage, emailing HelpDesk@sfs.ny.gov, or calling 877-737-4185 toll-free.

Select an activity below

☒ Collaborate on Prequalification Application

Supplier ID:

INWOOD COMMUNITY SERVICES INC

Prequalification Application Started: 05/06/2025

Organization Type: Not-For-Profit

[View Version History](#)

[View Agency Feedback](#)

Step	Action
66.	Note: - The View Agency Feedback link will only be displayed on the Welcome Page after the Prequalification application has been submitted. - After clicking the View Agency Feedback link, the Comments page will display with agency feedback. If no agency feedback is available the Comments page will be blank.
67.	You have successfully completed the Enter and Submit a Prequalification Application topic.

Responding to Bid Events (Grant Opportunities)

Lesson Description:

This lesson provides the knowledge and skills to respond to Bid Events. Bid Events are grant opportunities that allow bidders to submit a bid response in order to apply for a funding award.

As part of a bid response, bidders provide responses to questions, attach documents, and provide other required, relevant information.

Lesson Objectives:

In this lesson, you will learn how to:

- Respond to Bid Event Expenditure Budget Types
- Respond to Bid Event Performance Budget Types
- Respond to Bid Event Capital Budget Types
- Using the Match Worksheet for a Bid Response

SFS Handbook: Grantee Processing in SFS

Respond to Bid Event Expenditure Budget Types

Topic Description:

This topic provides the knowledge and skills to respond to Bid Event Expenditure Budget Types. Budget types dictate the grant opportunity attributes available for each section of a period budget. Expenditure budget types allow grantees to record projected costs on a bid event and on a grant contract.

Topic Objectives:

In this topic, you will learn:

- How to respond to Bid Event Expenditure Budget Types.

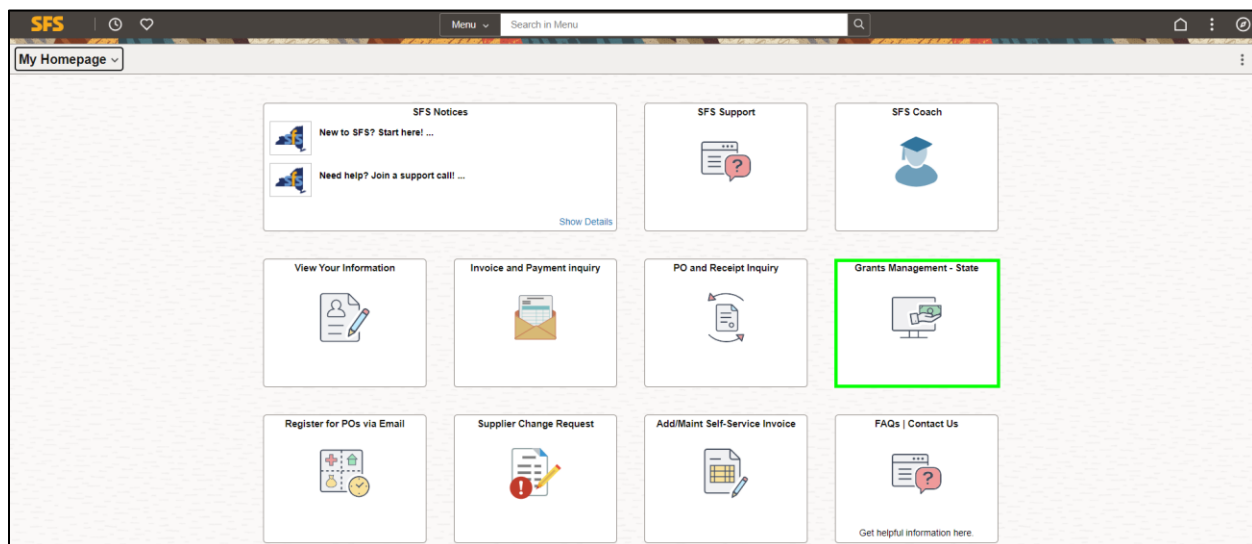
SFS role(s) required to perform this task:

- Bid Response Initiator (NY_GM_VENDOR_EVENT_INITIATE)
 - **Note:** This role allows you to initiate a bid response to a bid event but not submit the bid response to the agency.
- Bid Response Submitter (NY_GM_VENDOR_EVENT_SUBMIT)
 - **Note:** This role allows you to both initiate a bid response and submit a bid response to the agency.

Procedure

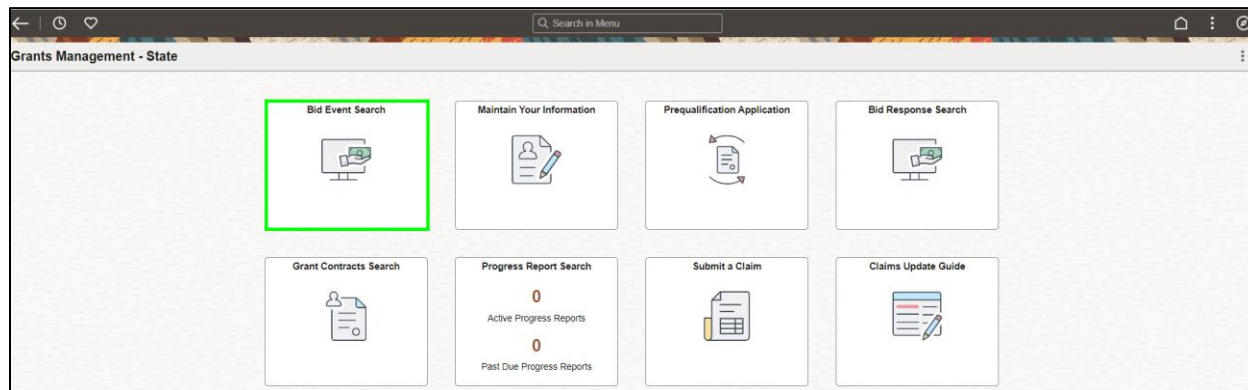
Scenario: You will log in to the SFS Vendor Portal, search for an available bid event (grant opportunity) and respond to the agency questions. You will also enter your budget, work plan information, and your bid price before submitting to the agency for review.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



SFS Handbook: Grantee Processing in SFS

Step	Action
1.	Preferred Navigation: Click the Grant Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > View Events and Place Bids  Note: You must log in to the SFS Vendor Portal to respond to a bid event.



Step	Action
2.	Click the Bid Event Search tile.

Event ID	Funding Agency	Grant Opportunity	Status	Eligibility	Availability Date	Anticipated Release Date	Du
EV70000001	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/17/24 2:01PM	04/17/24 2:01PM	04/17/24 2:01PM

Step	Action
3.	Enter the applicable search criteria in the Search Criteria fields.

SFS Handbook: Grantee Processing in SFS

Step	Action
	In this example, we will select the Search by Status field drop-down list and click Available from the list.
4.	Click the Search button.
5.	Note: A list of Event IDs will populate based on the search criteria entered. Click an Event ID link to initiate a bid response.

The screenshot shows the 'Event Details' page in the SFS system. At the top, there's a navigation bar with 'New Window' and 'Personalize Page' links. Below the header, a welcome message for 'John Doe' is displayed. The main content area is divided into sections. On the left, under 'Information On Inquiry Options', there are two buttons: 'Accept Invitation' and 'Bid on Event'. The 'Bid on Event' button is highlighted with a green rectangular box. To the right of these buttons, under 'Bidding Shortcuts', there are links for 'View Event Activity', 'View Event Package', and 'Upload XML Bid Response'. Below this, a detailed event information box is shown. It includes the Event Name 'Outpatient Treatment Programs for Adolescents', Event ID 'OMH01-EVT0000001', Event Format 'Sell Event', Event Round '1', and Event Version '1'. The Event Start Date is '04/17/2024 2:01PM EDT' and the Event End Date is '04/18/2024 05:01 PM EDT'. Below the event details, there's an 'Event Description' section with a text area containing information about the New York State Agency's commitment to reducing inpatient hospitalizations. At the bottom, contact information for 'DOE, JOHN' is listed, along with 'Payment Terms' and 'My Bids' (0). There are also links for 'Online Discussion' and 'Live Chat Help'.

Step	Action
6.	Click the Bid on Event button. Bid on Event

SFS Handbook: Grantee Processing in SFS

Event Details

Welcome, Outreach Organization
User: John Doe

[Submit Bid](#) [Save for Later](#) [Cancel](#) [Validate Entries](#)

Event Name: Outpatient Treatment Programs for Adolescents **Bidding Instructions:**

Event ID: OMH01-EVT000001 **Additional Bid Info** **Bid ID:** New

Event Format/Type: Sell Event **RFX** **Bid Date:**

Event Round: 1 **Bid Currency:** USD US Dollar

Event Version: 1 **Event Start Date:** 04/17/2024 2:01PM EDT **Estimated Award Date:**

Event End Date: 04/19/2024 05:01 PM EDT **Anticipated Contract Date:**

Processing Status: Bid Event Published

[Hide Additional Event Info](#)

Description:
The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of for individuals less than 18 years old.
New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.
All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact: DOE, JOHN **Payment Terms:**

Phone: **Billing Location:** Office of Mental Health

Email: test123@sfs.ny.gov **Event Currency:** Dollar

Online Discussion: **Conversion Rate:** 1.0000000

Edits to Submitted Bids: Not Allowed

Multiple Bids: Allowed

Step	Action
7.	Review the Event Start, Event End Date, Estimated Award Date, Anticipated Contract Date fields.
8.	Click the Additional Bid Info link.

Additional Bid Response fields

Additional Bid Response Info

Organization Type: Not-For-Profit **Letter of Intent:** ☐

Taxpayer Identification Number: **Questions & Answers Post Type:** Provide a Link

Bidders Conference Application Workshop: [Questions & Answers Link](#)

Contract Type: Fixed **Questions and Answers Upload:**

Length: **Questions and Answers Narrative:** test

Narrative: test

OK **Cancel**

Step	Action
9.	Review the Additional Bid Info .
	Click the OK button to return to the Event Details page.

SFS Handbook: Grantee Processing in SFS

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event	1
Lines Responded To	0
Your Total Line Pricing	0.0000 USD

[Hide Line Detail](#)

★ Bid Required 📎 Line Comments/Files

Lines

<

<

1-1 of 1

>

>

View All

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price	
1	Period Details -1		Line 1	EA			🗨

Event Comments and Attachments

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

Submit Bid

Save for Later

Validate Entries

[Return to Event Search](#)

Step	Action
10.	Select the Events Comments and Attachments link, located at the bottom of the page, to view any instructions and view/add any attachments and/or comments. You may need to scroll to see this link.

SFS Handbook: Grantee Processing in SFS

Event Comments and Attachments

Attached File	Attachment Description	View
Budget Worksheets_-_MWRR_Capital_Projects.pdf	Budget Worksheets	View
EO_16.pdf	EO 16	View
Attachment_S.pdf	Attachment S	View
Vehicle_Information_Form.pdf	Vehicle Information Form	View
Attachment_S.pdf	Attachment S	View
Certificate_as_to_Title_Form.pdf	Certificate as to Title Form	View

Add New Attachments

Attached File	Attachment Description	Upload	View		
		Upload	View	Add New Attachments	Delete

Comments

Add New Comments

OK

Cancel

Step	Action
11.	Click the View button to view any attached documents.
12.	If needed, click the Upload button under the Add New Attachments section to attach additional document(s). Note: Per agency guidance, you could be required to upload an attachment specified in the bid factor section of a bid response.

File Attachment

Choose File

No file chosen

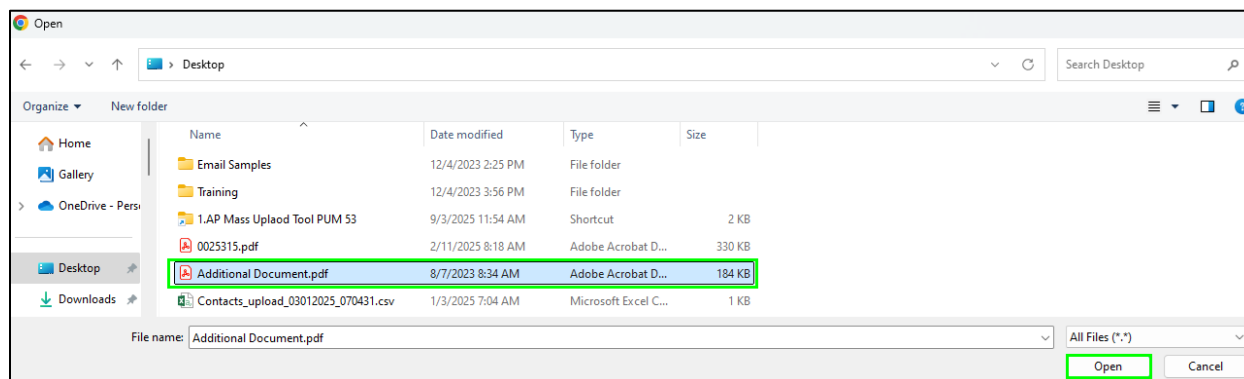
Upload

Cancel

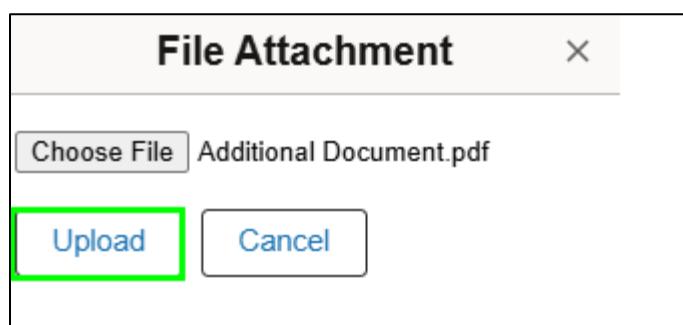
Step	Action
------	--------

SFS Handbook: Grantee Processing in SFS

13.	Click the Choose File button.
-----	--------------------------------------



Step	Action
14.	Select the document that you like to upload and then click the Open button.



Step	Action
15.	Click the Upload button to upload and attach the document.

SFS Handbook: Grantee Processing in SFS

Event Comments and Attachments

Attached File	Attachment Description	View
Budget_Worksheets_-_MWRR_Capital_Projects.pdf	Budget Worksheets	View
EO_16.pdf	EO 16	View
Attachment_S.pdf	Attachment S	View
Vehicle_Information_Form.pdf	Vehicle Information Form	View
Attachment_S.pdf	Attachment S	View
Certificate_as_to_Title_Form.pdf	Certificate as to Title Form	View

Add New Attachments

Attached File	Attachment Description	Upload	View		
Additional_Document.pdf	Additional Document	Upload	View	Add New Attachments	Delete

Comments

Add New Comments

OK

Cancel

Step	Action
16.	If needed, enter a description of the attached document in the Attachment Description field.
17.	Click the View button to view the newly attached document.
18.	Click the Add New Attachments link to upload additional documents.
19.	Click the Delete link to remove a corresponding attached document.
20.	Enter new comments in the Add a New Comments field.
21.	Click the OK button to return to the Event Details page.

SFS Handbook: Grantee Processing in SFS

Event Details

Event Format/Type: Sell Event RFx
 Event Round: 1
 Event Version: 1
 Event Start Date: 04/17/2024 2:01PM EDT
 Event End Date: 04/19/2024 05:01 PM EDT
 Processing Status: Bid Event Published
 Bid Date: [blank]
 Bid Currency: USD US Dollar
 Estimated Award Date: [blank]
 Anticipated Contract Date: [blank]

[Hide Additional Event Info](#)

Description:
 The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of for individuals less than 18 years old.
 New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.
 All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact: DOE, JOHN
 Phone: [blank]
 Email: test123@sfs.ny.gov
 Online Discussion: [blank]

Payment Terms: [blank]
 Billing Location: Office of Mental Health
 Event Currency: Dollar
 Conversion Rate: 1.00000000
 Edits to Submitted Bids: Not Allowed
 Multiple Bids: Allowed

Step 1: Answer General Event Questions
 The event administrator requests your response to questions not specific to any specific item.

General Event Questions: 5
 Required Questions: 5
 Questions Responded To: 0

DUNS Number: [blank]
 Organization Website: [blank]
 User Name: Doe, John

[Site/Project Address](#)

Bidder Contact Information
 Name: [blank]
 Telephone: [blank]
 Email: [blank]

[Hide Event Questions](#)

Step	Action
22.	Use the scrollbar to navigate to the Step 1: Answer General Event Questions section.
23.	If applicable, enter your Organization Website in the Organization Website field. This field is optional and not required.
24.	Under the Bidder Contact Information , enter the following information: • Name • Telephone • Email Note: The contact listed should be the person/people within the organization who can be contacted with questions about the bid response.
25.	Click the Site/Project Address link.

SFS Handbook: Grantee Processing in SFS

Bid Response address fields

Site/Project Address

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1 of 1

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>

|

View All

Address Line 1

Address Line 2

City

Postal Code

State

+

-

OK

Cancel

Step	Action
26.	Enter Address Details, including the following information: • Address Line 1 • Address Line 2 (if applicable) • City • Postal Code • State Note: The Site/Project Address is where the grant will be used, or funds will be spent.
27.	When you have finished entering address details, click the OK button.

SFS Handbook: Grantee Processing in SFS

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Event Details

Event Questions

★ Bid Required

👍 Ideal Response Required

General Questions

< 1 of 5 >

★

How many clients do you anticipate servicing in the first year of programming?

Response

Best 0

Worst 0

Weighting

[Add Comments or Attachments](#)

★

Provide intake form for incoming clients.

★

Describe the agency's experience serving adolescents with serious mental illness. Describe any outpatient programming that the agency has operated in the past.

Response

[📎](#) [🔗](#)

★

Choose the types of service you will provide during outpatient programming. If you choose medication management, please upload a copy of the MD's license who will be supervising.

Response

Weighting

[Add Comments or Attachments](#)

Step	Action
28.	Review and respond to Event Questions. Those that are flagged as Required (*) must be responded to in order to submit a bid response. Note: - Text responses are limited to 2,000 characters. Comments/Attachments can be utilized to add additional text if the 2,000-character limit is met. - The ability to add a Comment/Attachment will vary based on the question.

← | ○ | ○

Home | Settings | Logout

Event Details

Welcome, Outreach Organization
User: John Doe

New Window | Personalize Page

1 Message not found

Submit Bid

Save for Later

Cancel

Validate Entries

Event Name

Outpatient Treatment Programs for Adolescents

Bidding Instructions

Bid Response PDF

Event ID

OLH401-EVT0000001

Additional Bid Info

Event Format/Type

Sell Event

Bid ID

1

Event Round

1

Bid Date

Event Version

1

Bid Currency

USD US Dollar

Event Start Date

04/17/2024 2:01PM EDT

Estimated Award Date

Event End Date

04/19/2024 05:01 PM EDT

Anticipated Contract Date

Processing Status

Bid Event Published

Hide Additional Event Info

Description:

The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of stay for individuals less than 18 years old.

New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.

All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact

DOE, JOHN

Phone

Email

test123@sfs.ny.gov

Online Discussion

Payment Terms

Billing Location

Office of Mental Health

Event Currency

Dollar

Conversion Rate

1.00000000

Edits to Submitted Bids

Not Allowed

Multiple Bids

Allowed

SFS Handbook: Grantee Processing in SFS

Step	Action
29.	Click the Save for Later button.

The bid is not complete. (18058,342)

If you would like to save your bid for submittal at a later time, select "OK". If not, select "Cancel" to return to the bid response pages so that you can continue editing your bid.

Step	Action
30.	In the resulting popup, click the OK button to save your progress. Note: Error messages will display on the page if any required field(s) are left blank upon saving a bid response. The error messages will state which field(s) require a response.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event 1
 Lines Responded To 0
 Your Total Line Pricing 0.0000 USD

[Hide Line Detail](#)

★ Bid Required [Line Comments/Files](#)

Lines

1-1 of 1 [View All](#)

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price	
1	Period Details - 1		Line 1	EA			Comment

Step	Action
31.	Scroll to the bottom of the page. Under the Lines section, click the Period Details - 1 link under the Period column to access budget and work plan information.

SFS Handbook: Grantee Processing in SFS

Create Bids

Business Unit: CMH01 Budget Type: EXPENDITURE
 Event ID: EVT0000001 Funded Amount: 3000000.000
 Bidder Setid: SHARE Period: 1 Bidder ID: 1100314197

Bid Event Periods

Period: 1
 Period From: 09/01/2024 Period To: 08/31/2025
☐ Budget Required [Budget properties](#)
☐ Work Plan Required [Work Plan Properties](#)

Bid Event Line#: 1

[Return to Bid Response](#)

Step	Action
32.	Click the Budget properties link.

Budget Properties Header

Event ID: EVT0000001 Max Award Amount: 3000000.000
 Bid Event Period: 1 Period From Date: 09/01/2024
 Bidder/Vendor ID: 1100314197 Period To Date: 08/31/2025
 Budget Type: EXPENDITURE

Budget Properties

Apply Match: [?](#)
 Calculate Match:
☐ Include Match Worksheet

Budget Category Properties

Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage
1 SALARY	☐	☐	0	☐	☐	
2 FRINGE	☐	☐	0	☐	☐	
3 CONTRACTUAL	☒	☐	0	☐	☐	
4 TRAVEL	☐	☐	0	☐	☐	
5 EQUIPMENT	☐	☐	0	☐	☐	

Step	Action
33.	Review the Budget Header Information .

SFS Handbook: Grantee Processing in SFS

34.	Review Budget Category Property section (including Narrative), noting which rows have Available in Grant checked. Note: This section was completed by the agency to help the grantee understand which Budget Category(s) require a response. Grantees will need to scroll down to view the sections they are responsible for updating.
-----	---

Budget Properties Header

10 OTHER

☒

☐

0

☐

☐

Narrative

Period Budget Summary

Q

1-10 of 10

View All

	Budget Category	Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SALARY	0.00	0.00	0	0	0.00	0.00	
2	FRINGE	0.00	0.00	0	0	0.00	0.00	
3	CONTRACTUAL	0.00	0.00	0	0	0.00	0.00	
4	TRAVEL	0.00	0.00	0	0	0.00	0.00	
5	EQUIPMENT	0.00	0.00	0	0	0.00	0.00	
6	SPACE/PROPERTY RENT	0.00	0.00	0	0	0.00	0.00	
7	SPACE/PROPERTY OWN	0.00	0.00	0	0	0.00	0.00	
8	UTILITIES	0.00	0.00	0	0	0.00	0.00	
9	OPERATING EXPENSES	0.00	0.00	0	0	0.00	0.00	
10	OTHER	0.00	0.00	0	0	0.00	0.00	

Step	Action
35.	Under the Period Budget Summary section, click on View All icon to show all budget categories. You may need to click the scrollbar to view this section of the page. In this example, we will enter budget information for the Contractual budget category.
36.	Under the Period Budget Summary section, click on Category Details icon for the Contractual budget category.  Note: Where the icon cannot be clicked, the agency has not checked the Available in Grant checkbox above.

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Category Details

Budget Type EXPENDITURE
Budget Category CONTRACTUAL

Match % Required

Category Details

1-1 of 1

	Type/Description	Grant Funds	Match Funds	Match %	Other funds
1					

Category Totals

Cumulative Grant Funds 0.00

Cumulative Match Funds 0.00

Cumulative Other Funds 0.00

Cumulative Category Details Totals 0.00

Narrative

OK

Cancel

Step	Action
37.	Enter the applicable value into the Grant Funds field. In this example, we will enter 10,000 into the Grant Funds field.
38.	Enter the applicable value into the Match Funds field. In this example, we will leave this field blank.
39.	Enter the applicable value into the Other Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move onto the next step.
40.	Enter the applicable value into the Type/Description field. In this example, we will leave this field blank.

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Step	Action
41.	Enter the applicable value into the Narrative field. Note: The narrative could be additional information for the agency or could be used to summarize the changes you made. In this example, we will not enter a narrative for the contractual budget category.
42.	Click the OK button.

Budget Properties Header

Narrative

Period Budget Summary

☐ ☐

1-5 of 10 [View All](#)

	Budget Category	Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SALARY	0.00	0.00	0	0	0.00	0.00	
2	FRINGE	0.00	0.00	0	0	0.00	0.00	
3	CONTRACTUAL	10000.00	0.00	0	0	0.00	10000.00	
4	TRAVEL	0.00	0.00	0	0	0.00	0.00	
5	EQUIPMENT	0.00	0.00	0	0	0.00	0.00	

Sub Totals

Grants Funds	10000.00	Match % Calc	0.00
Match Funds	0.00	Other Funds	0.00
Total	10000.00		

Back

Save

Step	Action
43.	Click the Save button.
44.	Click the Back button.

SFS Handbook: Grantee Processing in SFS

Create Bids

Business Unit: OMH01 Budget Type: EXPENDITURE
 Event ID: EVT0000001 Funded Amount: 3000000.000
 Bidder Setid: SHARE Period: 1 Bidder ID: 1100314197

Bid Event Periods

Period: 1
 Period From: 09/01/2024 Period To: 08/31/2025
☐ Budget Required [Budget properties](#)
☐ Work Plan Required [Work Plan Properties](#)

Bid Event Line#: 1

[Return to Bid Response](#)

Step	Action
45.	Click the Work Plan Properties link.

Create Bids

Work Plan

Work Plan Header

Event ID: EVT0000001 Business Unit: OMH01 WorkPlan ID: EVT0000001-R1V1P1-1100314197-21
 Bidder ID: 1100314197 Period From: 09/01/2024 Period To: 08/31/2025
☒ Allow Bidder Defined Objective and Tasks: [Work Plan Overview](#)
[Work Plan Overview Report](#)

Maximum Number of:
 Objectives: 50
 Tasks: 100
 Performance Measures: 300

Online Work Plan Required: ☐

Project Summary

Operation of Outpatient Programs

Step	Action
46.	Review the Work Plan Header information and verify the Allow Bidder Defined Objectives and Tasks is selected.
47.	Note: If the Allow Bidder Defined Objectives & Tasks box is checked and the Maximum Number of Objectives, Tasks, and Performance Measures have not already been entered, then you can add new objective, tasks, and performance measures if needed.
48.	Enter the applicable value into the Project Summary field if not already entered by the agency. In this example, we will enter Operation of Outpatient Programs in the Project Summary field.

SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures

Display Type: All

1-9 of 9

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
☒	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☒	☒
☐	Task	1.1	Hire staff to operate program	Hire staff to operate program	☒	☒
☐	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☒	☒
☐	Task	1.2	Obtain Office Space	Obtain Office Space	☒	☒
☐	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	☒	☒
☐	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	☒	☒
☐	Performance Measure	1.3.1	List referring agencies	List referring agencies	☒	☒
☐	Performance Measure	1.3.2	Describe referral process	Describe referral process	☒	☒
☐	Objective	2	Increase the number of opioid related	Increase the number of opioid related	☐	☒

Back Save Refresh

Step	Action
49.	In this example, we will add additional rows in the Objectives >> Tasks >> Performance Measures section. Note: The First Objective with the underlying Task and Performance Measure in the list was entered by the agency. Click on the Objective row to add additional objectives.
50.	Click the + Objective button.
51.	Enter the applicable information on the Objective row, in the Name field. On the Objective row, in this example we will enter Increase the number of opioid related resources available to community members in the Name field.
52.	Enter the applicable information on the Objective row, in the Description field. On the Objective row, in this example we will enter Increase the number of opioid related resources available to community members in the Description field.

SFS Handbook: Grantee Processing in SFS

The screenshot shows the SFS Grantee Processing interface. At the top, there are tabs for 'Objective', 'Task', and 'Perf. Measure'. The 'Task' tab is selected. Below the tabs is a table with columns: Select, Type, Sort Order, Name, Description, Required, and Allowed to Sort. The table contains 10 rows. Row 9 is highlighted, showing an objective to 'Increase the number of opioid related' and a task to 'Distribute Narcan kits to trained community members'. The 'Task' row is also highlighted. At the bottom, there are buttons for 'Back', 'Save', and 'Refresh'.

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
1	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☒	☒
2	Task	1.1	Hire staff to operate program	Hire staff to operate program	☒	☒
3	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☒	☒
4	Task	1.2	Obtain Office Space	Obtain Office Space	☒	☒
5	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	☒	☒
6	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	☒	☒
7	Performance Measure	1.3.1	List referring agencies	List referring agencies	☒	☒
8	Performance Measure	1.3.2	Describe referral process	Describe referral process	☒	☒
9	Objective	2	Increase the number of opioid related	Increase the number of opioid related	☐	☒
10	Task	2.1	Distribute Narcan kits to trained community members	Distribute Narcan kits to trained community members	☐	☒

Step	Action
53.	Select the Objective row where the task will be added.
54.	Click + Task button.
55.	Enter the applicable information on the Task row, in the Name field. On the Task row, in this example we will enter Distribute Narcan kits to trained community members in the Name field.
56.	Enter the applicable information on the Task row, in the Description field. On the Task row, in this example we will enter Distribute Narcan kits to trained community members in the Description field.

SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures

Objective Task **Perf. Measure** Display Type: All

1-11 of 11 View All

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
☐	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☒	☒
☐	Task	1.1	Hire staff to operate program	Hire staff to operate program	☒	☒
☐	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☒	☒
☐	Task	1.2	Obtain Office Space	Obtain Office Space	☒	☒
☐	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	☒	☒
☐	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	☒	☒
☐	Performance Measure	1.3.1	List referring agencies	List referring agencies	☒	☒
☐	Performance Measure	1.3.2	Describe referral process	Describe referral process	☒	☒
☐	Objective	2	Increase the number of opioid related	Increase the number of opioid related	☐	☒
☒	Task	2.1	Distribute Narcan kits to trained	Distribute Narcan kits to trained	☐	☒
☐	Performance Measure	2.1.1	Number of kits distributed	Number of kits distributed	☐	☒

Objective Task **Perf. Measure** Display Type: All

Step	Action
57.	Select the Task row where the performance measure will be added.
58.	Click + Performance Measure button.
59.	Enter the applicable information on the Performance Measure row, in the Name field. On Performance Measure row, in this example we will enter Number of kits distributed in the Name field.
60.	Enter the applicable information on the Performance Measure row, in the Description field. On Performance Measure row, in this example we will enter Number of kits distributed in the Description field.

SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures

Objective Task Perf. Measure Display Type: All

Basic Info More Details **▶**

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
☐	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☒	☒
☐	Task	1.1	Hire staff to operate program	Hire staff to operate program	☒	☒
☐	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☒	☒
☐	Task	1.2	Obtain Office Space	Obtain Office Space	☒	☒
☐	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	☒	☒
☐	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	☒	☒
☐	Performance Measure	1.3.1	List referring agencies	List referring agencies	☒	☒
☐	Performance Measure	1.3.2	Describe referral process	Describe referral process	☒	☒
☐	Objective	2	Increase the number of opioid related	Increase the number of opioid related	☐	☒
☒	Task	2.1	Distribute Narcan kits to trained	Distribute Narcan kits to trained	☐	☒
☐	Performance Measure	2.1.1	Number of kits distributed	Number of kits distributed	☐	☒

Objective Task Perf. Measure Display Type: All

Step	Action
61.	Click the arrow to the right of the More Details tab to expand the view and see all fields.

Sort Order	Name	Description	Required	Allowed to Sort	Allow Performance Measure	Perf Measure Response Type	Numeric (Target/Goal)
1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☒	☒			
1.1	Hire staff to operate program	Hire staff to operate program	☒	☒	☒		
1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☒	☒	☒	Numeric	5
1.2	Obtain Office Space	Obtain Office Space	☒	☒	☒		
1.2.1	Upload a copy of your lease	Upload a copy of your lease	☒	☒	☒	Attachment	
1.3	Define referral strategy and procedure	Define referral strategy and procedure	☒	☒	☒		
1.3.1	List referring agencies	List referring agencies	☒	☒	☒	Text/Comment	
1.3.2	Describe referral process	Describe referral process	☒	☒	☒	Text/Comment	
2	Increase the number of opioid related	Increase the number of opioid related	☐	☒			
2.1	Distribute Narcan kits to trained	Distribute Narcan kits to trained	☐	☒	☒		
2.1.1	Number of kits distributed	Number of kits distributed	☐	☒	☒	Numeric	100

Display Type: All

Back Save Refresh

Step	Action
62.	Note: Available Performance Measure options are: - Attachment - Date - Numeric - Text/Comment - Yes/No

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Step	Action
	In this example, on the Performance Measure row, we will select the Performance Measure Response Type drop-down list and select the Numeric option.
63.	Enter the applicable value into the Numeric (Target/Gol) field. In this example, we will enter 100 in the Numeric (Target/Gol) field.
64.	Click the Save button.
65.	Click the Back button.

Step	Action
66.	Click the Return to Bid Response link.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 1
Lines Responded To: 0
Your Total Line Pricing: 0.0000 USD

[Hide Line Detail](#)

★ Bid Required [Line Comments/Files](#)

Lines

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price	
1	Period Details -1		Line 1	EA	20000		Comment

[Event Comments and Attachments](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Submit Bid](#) [Save for Later](#) [Validate Entries](#)

SFS Handbook: Grantee Processing in SFS

Step	Action
67.	Note: The amount entered in the Your Unit Bid Price field must equal the total Grant Funds Requested amount for the period, in order to submit the bid response. In this example, we will enter 10,000 in the Your Unit Bid Price field.
68.	When you are ready to submit your bid response, click the Submit Bid button.

Are you done making changes and would like to post this bid? (18058,398)

Warning: Response may NOT be edited after posting. If you are not planning to make anymore changes to this bid press "Yes", otherwise press "No" and choose "Save For Later".

Step	Action
69.	In the resulting popup, click the Yes button to confirm you would like to submit the bid. Note: Error messages will display on the page if any required field(s) are left blank upon submitting a bid response. The error messages will state which fields require a response.
70.	You have successfully completed the Respond to Bid Event Expenditure Budget Types topic.

Respond to Bid Event Performance Budget Types

Topic Description:

This topic provides the knowledge and skills to respond to a Bid Event Performance Budget Type. Budget types dictate the grant opportunity attributes available for each section of a period budget. Performance budget types allow grantees to add costs and deliverables/outcomes on the bid event and grant contract.

Topic Objectives:

In this topic, you will learn:

- How to respond to a Bid Event Performance Budget Types

SFS role(s) required to perform this task:

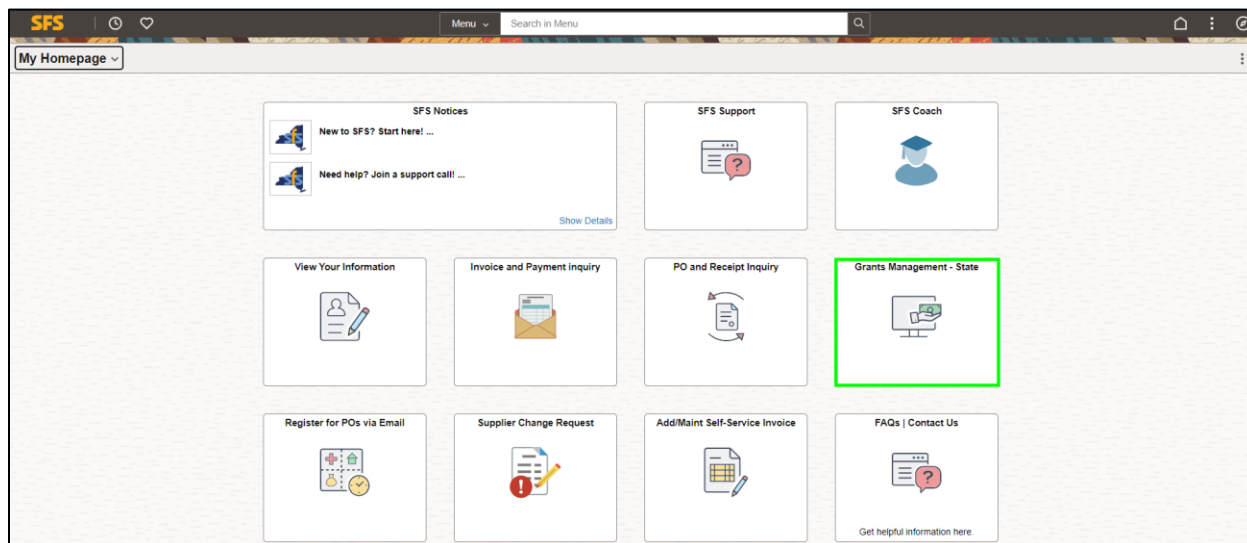
- Bid Response Initiator (NY_GM_VENDOR_EVENT_INITIATE)
 - **Note:** This role allows you to initiate a bid response to a bid event but not submit the bid response to the agency.
- Bid Response Submitter (NY_GM_VENDOR_EVENT_SUBMIT)
 - **Note:** This role allows you to both initiate a bid response and submit a bid response to the agency.

Procedure

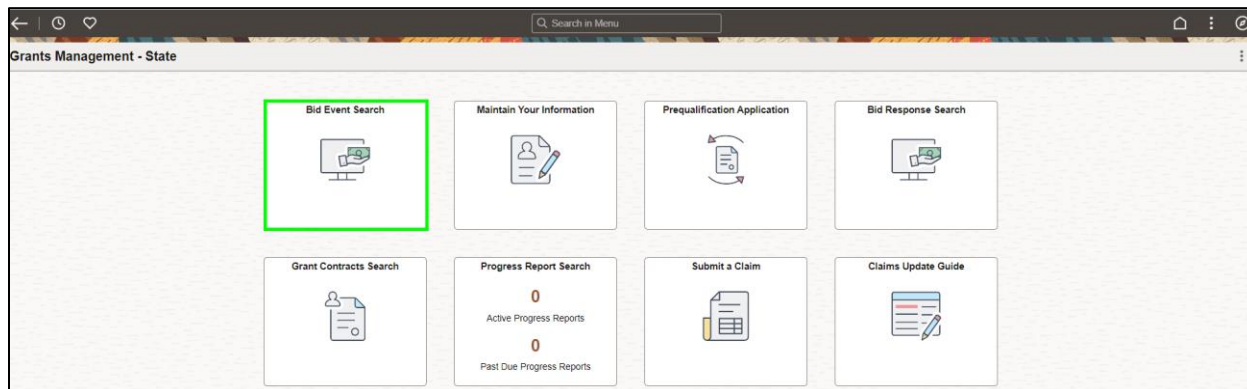
SFS Handbook: Grantee Processing in SFS

Scenario: You will log in to the SFS Vendor Portal, search for an available bid event (grant opportunity) and respond to the agency questions. You will also enter your budget, work plan information, and your bid price before submitting to the agency for review.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



Step	Action
1.	Preferred Navigation: Click the Grant Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > View Events and Place Bids 
	Note: You must log in to the SFS Vendor Portal to respond to a bid event.



SFS Handbook: Grantee Processing in SFS

Step	Action
2.	Click the Bid Event Search tile.

View Events and Place Bids

Welcome, Outreach Organization
User: John Doe

Enter search criteria to locate an event for viewing or placing bids.

Search Criteria

Event ID

Search by Grant Opportunity

Search by Due Date
From To

Search by Status

Search by Eligibility

Search by Funding Agency

Search by Service Area

Search

Search Results

Event ID	Funding Agency	Grant Opportunity	Status	Eligibility	Availability Date	Anticipated Release Date
EVT0000001	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/17/24 2:01PM	04/17/24 2:01PM
EVT0000002	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/18/24 9:56AM	04/18/24 9:56AM

Step	Action
3.	Enter the applicable search criteria in the Search Criteria fields. In this example, select the Search by Status field drop-down list and click Available from the list.
4.	Click the Search button. 
5.	Note: A list of Event IDs will populate based on the search criteria entered. Click an Event ID link to initiate a bid response. In this example, we will click the Bid Event EVT0000002 link to initiate a bid response.

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Event Details' page for an event titled 'Outpatient Treatment Programs for Adolescents'. The 'Information On Inquiry Options' section on the left contains three buttons: 'Accept Invitation', 'Decline Invitation', and 'Bid on Event'. The 'Bid on Event' button is highlighted with a green border. To the right, under 'Bidding Shortcuts', there are links for 'View Event Activity', 'View Event Package', and 'Upload XML Bid Response'. Below these, the event details are listed: Event Name, Event ID (OM/H01-EVT0000002), Event Format/Type (Sell Event RFX), Event Round (1), Event Version (1), Event Start Date (04/18/2024 9:56AM EDT), and Event End Date (04/19/2024 05:00 PM EDT). A description of the event is provided, followed by contact information for DOE, JOHN and payment terms.

Step	Action
6.	Click the Bid on Event button.

A close-up of the 'Bid on Event' button, which is a rectangular button with a blue border and the text 'Bid on Event' in blue.

The screenshot shows the 'Event Details' page with the 'Additional Bid Info' section highlighted in green. This section includes fields for 'Event Name', 'Event ID', 'Event Format/Type', 'Event Round', 'Event Version', 'Event Start Date', 'Event End Date', 'Processing Status', 'Bid ID', 'Bid Date', 'Bid Currency', 'Estimated Award Date', and 'Anticipated Contract Date'. The 'Event Start Date' and 'Event End Date' fields are highlighted in green. The 'Estimated Award Date' and 'Anticipated Contract Date' fields are also highlighted in green. The 'Event Start Date' is 04/18/2024 9:56AM EDT and the 'Event End Date' is 04/19/2024 05:00 PM EDT. The 'Estimated Award Date' is 05/01/2024 and the 'Anticipated Contract Date' is 09/01/2024. The 'Event Name' is 'Outpatient Treatment Programs for Adolescents' and the 'Event ID' is 'OM/H01-EVT0000002'. The 'Event Format/Type' is 'Sell Event RFX' and the 'Event Round' is '1'. The 'Event Version' is '1'. The 'Processing Status' is 'Bid Event Published'. The 'Bid ID' is 'New' and the 'Bid Date' is 'New'. The 'Bid Currency' is 'USD' and the 'US Dollar' is selected. The 'Estimated Award Date' is '05/01/2024' and the 'Anticipated Contract Date' is '09/01/2024'. The 'Event Name' is 'Outpatient Treatment Programs for Adolescents' and the 'Event ID' is 'OM/H01-EVT0000002'. The 'Event Format/Type' is 'Sell Event RFX' and the 'Event Round' is '1'. The 'Event Version' is '1'. The 'Event Start Date' is '04/18/2024 9:56AM EDT' and the 'Event End Date' is '04/19/2024 05:00 PM EDT'. The 'Processing Status' is 'Bid Event Published'. The 'Bid ID' is 'New' and the 'Bid Date' is 'New'. The 'Bid Currency' is 'USD' and the 'US Dollar' is selected. The 'Estimated Award Date' is '05/01/2024' and the 'Anticipated Contract Date' is '09/01/2024'. The 'Event Name' is 'Outpatient Treatment Programs for Adolescents' and the 'Event ID' is 'OM/H01-EVT0000002'. The 'Event Format/Type' is 'Sell Event RFX' and the 'Event Round' is '1'. The 'Event Version' is '1'. The 'Event Start Date' is '04/18/2024 9:56AM EDT' and the 'Event End Date' is '04/19/2024 05:00 PM EDT'. The 'Processing Status' is 'Bid Event Published'. The 'Bid ID' is 'New' and the 'Bid Date' is 'New'. The 'Bid Currency' is 'USD' and the 'US Dollar' is selected. The 'Estimated Award Date' is '05/01/2024' and the 'Anticipated Contract Date' is '09/01/2024'.

Step	Action
7.	Review the Event Start, Event End Date, Estimated Award Date, Anticipated Contract Date fields.

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Step	Action
8.	Click the Additional Bid Info link.

Additional Bid Response fields

Additional Bid Response Info

Organization Type Not-For-Profit
Taxpayer Identification Number
Bidders Conference Application Workshop
Contract Type Fixed
Length 12
Narrative test

☐ Letter of Intent
Questions & Answers Post Type Provide a Link
[Questions & Answers Link](#)
Questions and Answers Upload
Questions and Answers Narrative test

OK

Cancel

Step	Action
9.	Review the Additional Bid Info . Click the OK button to return to the Event Details page.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event 1
Lines Responded To 0
Your Total Line Pricing 0.0000 USD

[Hide Line Detail](#)

★ Bid Required [Line Comments/Files](#)

Lines

1-1 of 1

View All

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price	
1	Period Details -1		Line 1	EA			Comment

Event Comments and Attachments

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

Submit Bid

Save for Later

Validate Entries

[Return to Event Search](#)

Step	Action
10.	Select the Events Comments and Attachments link, located at the bottom of the page, to view any instructions and view/add any attachments and/or comments. You may need to scroll to see this link.

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Event Comments and Attachments

Attached File	Attachment Description	View
Budget Worksheets - _MWRR_Capital_Projects.pdf	Budget Worksheets	View
EO_16.pdf	EO 16	View
Attachment_S.pdf	Attachment S	View
Vehicle_Information_Form.pdf	Vehicle Information Form	View
Attachment_S.pdf	Attachment S	View
Certificate_as_to_Title_Form.pdf	Certificate as to Title Form	View

Add New Attachments

Attached File	Attachment Description	Upload	View		
		Upload	View	Add New Attachments	Delete

Comments

Add New Comments

OK

Cancel

Step	Action
11.	Click the View button to view any attached documents.
12.	Click the Upload button under the Add New Attachments section to attach additional document(s). Note: Per agency guidance, you could be required to upload an attachment specified in the bid factor section of a bid response.

File Attachment

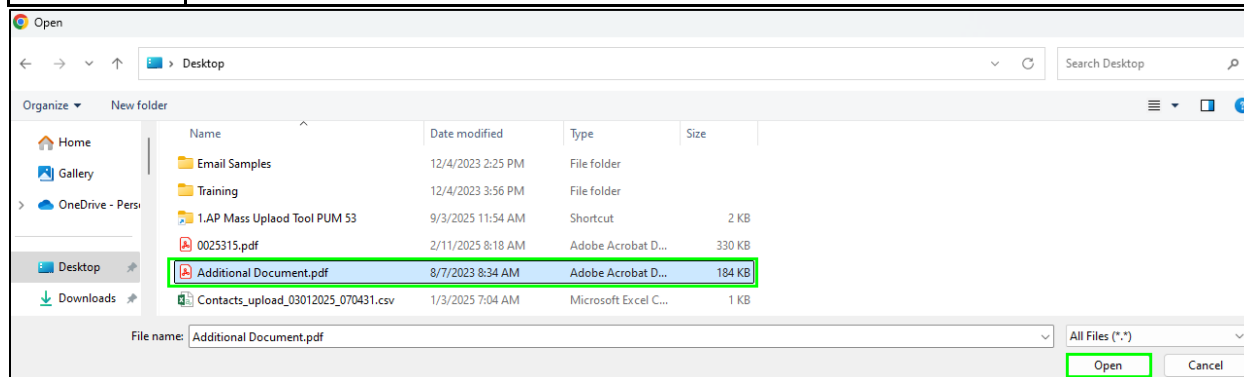
Choose File
No file chosen

Upload

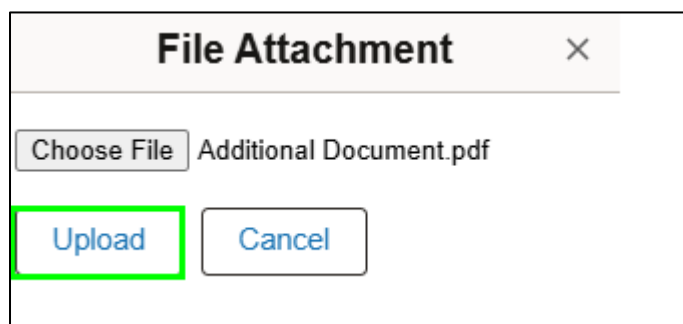
Cancel

SFS Handbook: Grantee Processing in SFS

Step	Action
13.	Click the Choose File button.



Step	Action
14.	Select the document that you like to upload and then click the Open button.



Step	Action
15.	Click the Upload button to upload and attach the document.

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Event Comments and Attachments

Attached File	Attachment Description	View
Budget_Worksheets_-_MWRR_Capital_Projects.pdf	Budget Worksheets	View
EO_16.pdf	EO 16	View
Attachment_S.pdf	Attachment S	View
Vehicle_Information_Form.pdf	Vehicle Information Form	View
Attachment_S.pdf	Attachment S	View
Certificate_as_to_Title_Form.pdf	Certificate as to Title Form	View

Add New Attachments

Attached File	Attachment Description	Upload	View		
Additional_Document.pdf	Additional Document	Upload	View	Add New Attachments	Delete

Comments

Add New Comments

OK

Cancel

Step	Action
16.	If needed, enter a description of the attached document in the Attachment Description field.
17.	Click the View button to view the newly attached document.
18.	Click the Add New Attachments link to upload additional documents.
19.	Click the Delete link to remove a corresponding attached document.
20.	Enter new comments in the Add a New Comments field.
21.	Click the OK button to return to the Event Details page.

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Event Details

Event ID: OMH01-EVT0000002 Additional Bid Info Bid ID: New

Event Format/Type: Sell Event RFX Bid Date

Event Round: 1 Bid Currency: USD US Dollar

Event Version: 1

Event Start Date: 04/18/2024 9:56AM EDT Estimated Award Date: 05/01/2024

Event End Date: 04/19/2024 05:00 PM EDT Anticipated Contract Date: 09/01/2024

Processing Status: Bid Event Published

[Hide Additional Event Info](#)

Description:

The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of stay for individuals less than 18 years old.

New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.

All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact: DOE, JOHN Payment Terms

Phone Billing Location: Office of Mental Health

Email: test123@sfs.ny.gov Event Currency: Dollar

Online Discussion Conversion Rate: 1.00000000

Edits to Submitted Bids: Not Allowed

Multiple Bids: Allowed

Step 1: Answer General Event Questions

The event administrator requests your response to questions not specific to any specific item.

General Event Questions: 5 DUNS Number:

Required Questions: 5 [Site/Project Address](#)

Questions Responded To: 0 [Organization Website](#)

User Name: Doe, John **Bidder Contact Information**

Name:

Telephone:

Email:

[Hide Event Questions](#)

Step	Action
22.	Use the scrollbar to navigate to the Step 1: Answer General Event Questions section.
23.	If applicable, enter your Organization Website in the Organization Website field. This field is optional and not required.
24.	Under the Bidder Contact Information , enter the following information: Name Telephone Email Note: The contact listed should be the person/people within the NFP who can be contacted with questions about the bid response
25.	Click the Site/Project Address link.

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Bid Response address fields

Site/Project Address

|

<

<

1 of 1

>

>

|

View All

Address Line 1

10 Tester Lane

Address Line 2

City

Albany

Postal Code

12345

State

NY

OK

Cancel

Step	Action
26.	Enter Address Details, including the following information: • Address Line 1 • Address Line 2 (if applicable) • City • Postal Code • State Note: The Site/Project Address is where the grant will be used, or funds will be spent.
27.	When you have finished entering address details, click the OK button.

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Event Details

Event Questions

★ Bid Required ★ Ideal Response Required

General Questions < 1 of 5 >

★

How many clients do you anticipate servicing in the first year of programming?

Response:

Best 0 Worst 0 Weighting: 0 Add Comments or Attachments

★

Provide intake form for incoming clients.

Enter File Attachment Response

★

Describe the agency's experience serving adolescents with serious mental illness. Describe any outpatient programming that the agency has operated in the past.

Response:

★

Choose the types of service you will provide during outpatient programming. If you choose medication management, please upload a copy of the MD's license who will be supervising.

Response:

Weighting: 0 Add Comments or Attachments

Step	Action
28.	Review and respond to Event Questions. Those that are flagged as Required (*) must be responded to in order to submit a bid response. Note: - Text responses are limited to 2,000 characters. Comments/Attachments can be utilized to add additional text if the 2,000-character limit is met. - The ability to add a Comment/Attachment will vary based on the question.

Event Details

Welcome, Outreach Organization
User: John Doe

Submit Bid **Save for Later** Cancel Validate Entries

Event Name Outpatient Treatment Programs for Adolescents **Bidding Instructions**

Event ID OMH01-EVT0000002 **Additional Bid Info** **Bid ID** New

Event Format/Type Sell Event **RFX** **Bid Date**

Event Round 1 **Bid Currency** USD **US Dollar**

Event Version 1 **Estimated Award Date** 05/01/2024

Event Start Date 04/18/2024 9:56AM EDT **Anticipated Contract Date** 09/01/2024

Event End Date 04/19/2024 05:00 PM EDT

Processing Status Bid Event Published

[Hide Additional Event Info](#)

Description:

The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of stay for individuals less than 18 years old.

New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.

All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact DOE, JOHN **Payment Terms**

Phone **Billing Location** Office of Mental Health

Email test123@sfs.ny.gov **Event Currency** Dollar

Online Discussion **Conversion Rate** 1.00000000

Edits to Submitted Bids Not Allowed

Multiple Bids Allowed

Step	Action
------	--------

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29.	Click the Save for Later button.
-----	---

The bid is not complete. (18058,342)

If you would like to save your bid for submittal at a later time, select "OK". If not, select "Cancel" to return to the bid response pages so that you can continue editing your bid.

Step	Action
30.	In the resulting popup, click the OK button to save your progress. Note: Error messages will display on the page if any required field(s) are left blank upon saving a bid response. The error messages will state which field(s) require a response.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 1
 Lines Responded To: 0
 Your Total Line Pricing: 0.0000 USD

[Hide Line Detail](#)

★ Bid Required [Line Comments/Files](#)

Lines

1-1 of 1 View All

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price	
1	Period Details -1		Line 1	EA			?

Step	Action
31.	Scroll to the bottom of the page. Under the Lines section, click the Period Details - 1 link under the Period column to access budget and work plan information.

Create Bids

Business Unit: OMH01 Budget Type: PERFORMANCE
 Event ID: EVT0000002 Funded Amount: 3000000.000
 Bidder Setid: SHARE Period: 1 Bidder ID: 1100314197

Bid Event Periods 1 of 1 View All

Period: 1
 Period From: 09/01/2024 Period To: 09/31/2025

☐ Budget Required [Budget properties](#)
☐ Work Plan Required [Work Plan Properties](#)

1 of 1 View All

Bid Event Line# 1

[Return to Bid Response](#)

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Step	Action
32.	Click the Budget properties link.

Budget Properties Header

Event ID	EVT0000002	Max Award Amount	3000000.000
Bid Event Period	1	Period From Date	09/01/2024
Bidder/Vendor ID	1100314197	Period To Date	08/31/2025
		Budget Type	PERFORMANCE

Budget Properties

Apply Match Allowed at Category I

Calculate Match Grant Fund

☐ Include Match Worksheet
☐ Allow Vendor to Add
☐ Use Other
☐ Overage on Claims

Overage %

Budget Category Properties

#	Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage		
1	Test Category	☒	☐	0	☐	☐		+	-

Narrative

Step	Action
33.	Review the Budget Header Information . This section was completed by the agency.
Step	Action
34.	Review Budget Category Property section (including Narrative), noting which rows have Available in Grant checked. Note: This section was completed by the agency to help the grantee understand which Budget Category(s) require a response.

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Budget Properties Header

Event ID: EVT0000002

Bid Event Period: 1

Bidder/Vendor ID: 1100314197

Max Award Amount: 3000000.000

Period From Date: 09/01/2024

Period To Date: 08/31/2025

Budget Type: PERFORMANCE

Budget Properties

Apply Match: Allowed at Category L

Calculate Match: Grant Fund

☐ Include Match Worksheet
☐ Allow Vendor to Add
☐ Use Other
☐ Overage on Claims

Overage %

Budget Category Properties

	Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage		
1	Test Category	☒	☐	0	☐	☐		+	-

Narrative:

Step	Action
35.	Under Budget Category Property section, click Plus Sign (+) to add a new row.

Budget Properties Header

Event ID: EVT0000002

Bid Event Period: 1

Bidder/Vendor ID: 1100314197

Max Award Amount: 3000000.000

Period From Date: 09/01/2024

Period To Date: 08/31/2025

Budget Type: PERFORMANCE

Budget Properties

Apply Match: Allowed at Category L

Calculate Match: Grant Fund

☐ Include Match Worksheet
☐ Allow Vendor to Add
☐ Use Other
☐ Overage on Claims

Overage %

Budget Category Properties

	Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage		
1	Test Category	☒	☐	0	☐	☐		+	-
2	Test Category 2	☒	☐	0	☐	☐		+	-

Narrative:

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Step	Action
36.	Enter the applicable deliverable or outcome into the Budget Category field.
37.	Click the Available in Grant checkbox so the budget category details can be entered for the category.
38.	Note: - When the Use Match checkbox is selected, the Match Funds field is available for entry on the Category Details page for the budget category. - When the Use Other checkbox is selected, the Other Funds fields is available for entry on the Category Details page for the budget category. In this example, we will not select these two options.

Budget Properties Header

Q

<

>

1-2 of 2

>

>

View All

	Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage		
1	Test Category	☒	☐	0	☐	☐		+	-
2	Test Category 2	☒	☐	0	☐	☐		+	-

Narrative

Period Budget Summary

Q

<

>

1-2 of 2

>

>

View All

	Budget Category	Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	Test Category	0.00	0.00	0	0	0.00	0.00	
2	Test Category 2	0.00	0.00	0	0	0.00	0.00	

Sub Totals

Grants Funds 0.00

Match % Calc 0.00

Match Funds 0.00

Other Funds 0.00

Total 0.00

Back

Save

Step	Action
39.	Scroll down to the Period Budget Summary section and click on the Category Details icon for the first budget category.

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Category Details ×

Budget Type PERFORMANCE

Budget Category Test Category

Match % Required

Category Details

1-1 of 1
View All

	Type/Description	Grant Funds	Match Funds	Match %	Other funds	Total Funds
1						

Category Totals

Cumulative Grant Funds 0.00

Cumulative Match Funds 0.00

Cumulative Other Funds 0.00

Cumulative Category Details Totals 0.00

Narrative

OK

Cancel

Step	Action
40.	Leave the Type/Description field blank.
41.	Enter the applicable value into the Grant Funds field. In this example, we will enter 10,000 in the Grant Funds field.
42.	Enter the applicable value into the Match Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move onto next step.
43.	Enter the applicable value into the Other Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move on to the next step.
44.	Enter the applicable value into the Narrative field. Note: The narrative could be additional information for the agency or could be used to summarize the changes you made.

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Step	Action
	In this example, we will leave this field blank.
45.	Click the OK button.
46.	Under the Period Budget Summary section, click on Category Details icon for the second budget category.
47.	Leave the Type/Description field blank.
48.	Enter the applicable value into the Grant Funds field. In this example, enter 10,000 in the Grant Funds field.
49.	Enter the applicable value into the Match Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move onto next step.
50.	Enter the applicable value into the Other Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move onto next step.
51.	Enter the applicable value into the Narrative field. Note: The narrative could be additional information for the agency or could be used to summarize the changes you made. In this example, we will leave this field blank.
52.	Click the OK button.

SFS Handbook: Grantee Processing in SFS

Budget Properties Header

Q

<

>

1-2 of 2

View All

	Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage		
1	Test Category	☒	☐	0	☐	☐		+	-
2	Test Category 2	☒	☐	0	☐	☐		+	-

Narrative

Period Budget Summary

Q

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1-2 of 2

View All

	Budget Category	Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	Test Category	10000.00	0.00	0	0	0.00	10000.00	
2	Test Category 2	10000.00	0.00	0	0	0.00	10000.00	

Sub Totals

Grants Funds	20000.00	Match % Calc	0.00
Match Funds	0.00	Other Funds	0.00
Total	20000.00		

Back

Save

Step	Action
53.	Click the Save button.
54.	Click the Back button.

Create Bids

Business Unit

OM/H01

Budget Type

PERFORMANCE

Event ID

EVT0000002

Funded Amount

3000000.000

Bidder Setid

SHARE

Period

1

Bidder ID

1100314197

Bid Event Periods

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1 of 1

View All

Period

1

Period From

09/01/2024

Period To

08/31/2025

☐ Budget Required

☐ Work Plan Required

Budget properties

Work Plan Properties

Q

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1 of 1

View All

Bid Event Line#

1

<Return to Bid Response

Step	Action
55.	Click the Work Plan Properties link.

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SFS Handbook: Grantee Processing in SFS

Create Bids

Work Plan

Work Plan Header

Event ID: EVT0000002 Business Unit: OM/H01 WorkPlan ID: EVT0000002-R1V1P1-1100314197-22
 Bidder ID: 1100314197 Period From: 09/01/2024 Period To: 08/31/2025 Period: 1
Allow Bidder Defined Objective and Tasks: ☒ [Work Plan Overview](#)
 Maximum Number of:
 Objectives: 50
 Tasks: 100
 Performance Measures: 300
 Online Work Plan Required: ☐

Project Summary

Step	Action
56.	Review the Work Plan Header information and verify the Allow Bidder Defined Objectives and Tasks is selected.
57.	Note: If the Allow Bidder Defined Objectives & Tasks box is checked and the Maximum Number of Objectives, Tasks, and Performance Measures have not already been entered, then you can add new objective, tasks, and performance measures if needed.
58.	Enter the applicable value into the Project Summary field.

Objectives >> Tasks >> Performance Measures

Objective **Task** **Perf. Measure** Display Type: All

1-9 of 9 View All

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
☒	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☒	☒
☐	Task	1.1	Hire staff to operate program	Hire staff to operate program	☒	☒
☐	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☒	☒
☐	Task	1.2	Obtain Office Space	Obtain Office Space	☒	☒
☐	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	☒	☒
☐	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	☒	☒
☐	Performance Measure	1.3.1	List referring agencies	List referring agencies	☒	☒
☐	Performance Measure	1.3.2	Describe referral process	Describe referral process	☒	☒
☐	Objective	2	Objective 2	Objective 2	☐	☒

Objective **Task** **Perf. Measure** Display Type: All

[Back](#) [Save](#) [Refresh](#)

SFS Handbook: Grantee Processing in SFS

Step	Action
59.	In this example, we will add additional rows in the Objectives >> Tasks >> Performance Measures section. Note: The First Objective with the underlying Task and Performance Measure in the list was entered by the agency. Click on the Objective row to add additional objectives.
60.	Click the + Objective button.
61.	On the Objective row, enter the applicable value in the Name field.
62.	On the Objective row, enter the applicable value in the Description field.

Objectives >> Tasks >> Performance Measures

Objective Task Perf. Measure

Display Type: All

1-10 of 10 View All

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
1 ☐	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☒	☒
2 ☐	Task	1.1	Hire staff to operate program	Hire staff to operate program	☒	☒
3 ☐	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☒	☒
4 ☐	Task	1.2	Obtain Office Space	Obtain Office Space	☒	☒
5 ☐	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	☒	☒
6 ☐	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	☒	☒
7 ☐	Performance Measure	1.3.1	List referring agencies	List referring agencies	☒	☒
8 ☐	Performance Measure	1.3.2	Describe referral process	Describe referral process	☒	☒
9 ☒	Objective	2	Objective 2	Objective 2	☐	☒
10 ☐	Task	2.1	Task 4	Task 4	☐	☒

Objective Task Perf. Measure

Display Type: All

Back Save Refresh

Step	Action
63.	Select the Objective row where the task will be added.
64.	Click + Task button.
65.	On the Task row, enter the applicable value in the Name field.
66.	On the Task row, enter the applicable value in the Description field.

SFS Handbook: Grantee Processing in SFS

Objective Task **Perf. Measure** Display Type: All

1-11 of 11 View All

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
☐	▼ Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☒	☒
☐	▼ Task	1.1	Hire staff to operate program	Hire staff to operate program	☒	☒
☐	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☒	☒
☐	▼ Task	1.2	Obtain Office Space	Obtain Office Space	☒	☒
☐	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	☒	☒
☐	▼ Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	☒	☒
☐	Performance Measure	1.3.1	List referring agencies	List referring agencies	☒	☒
☐	Performance Measure	1.3.2	Describe referral process	Describe referral process	☒	☒
☐	▼ Objective	2	Objective 2	Objective 2	☐	☒
☒	▼ Task	2.1	Task 4	Task 4	☐	☒
☐	Performance Measure	2.1.1	PM 5	PM 5	☐	☒

Objective Task **Perf. Measure** Display Type: All

Step	Action
67.	Select the Task row where the performance measure will be added.
68.	Click + Performance Measure button.
69.	On Performance Measure row, enter the applicable value in the Name field.
70.	On Performance Measure row, enter the applicable value in the Description field.

Objective Task **Perf. Measure** Display Type: All

1-11 of 11 View All

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
☐	▼ Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☒	☒
☐	▼ Task	1.1	Hire staff to operate program	Hire staff to operate program	☒	☒
☐	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☒	☒
☐	▼ Task	1.2	Obtain Office Space	Obtain Office Space	☒	☒
☐	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	☒	☒
☐	▼ Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	☒	☒
☐	Performance Measure	1.3.1	List referring agencies	List referring agencies	☒	☒
☐	Performance Measure	1.3.2	Describe referral process	Describe referral process	☒	☒
☐	▼ Objective	2	Objective 2	Objective 2	☐	☒
☒	▼ Task	2.1	Task 4	Task 4	☐	☒
☐	Performance Measure	2.1.1	PM 5	PM 5	☐	☒

Objective Task **Perf. Measure** Display Type: All

SFS Handbook: Grantee Processing in SFS

Step	Action
71.	Click the arrow to the right of the More Details tab to expand the view and see all fields.

	Sort Order	Name	Description	Required	Allowed to Sort	Allow Performance Measure	Perf Measure Response Type	Numeric (Target/Goal)
	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☒	☒			
	1.1	Hire staff to operate program	Hire staff to operate program	☒	☒	☒		
Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☒	☒		Numeric	5
	1.2	Obtain Office Space	Obtain Office Space	☒	☒	☒		
Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	☒	☒		Attachment	
	1.3	Define referral strategy and procedure	Define referral strategy and procedure	☒	☒	☒		
Measure	1.3.1	List referring agencies	List referring agencies	☒	☒		Text/Comment	
Measure	1.3.2	Describe referral process	Describe referral process	☒	☒		Text/Comment	
	2	Objective 2	Objective 2	☐	☒			
	2.1	Task 4	Task 4	☐	☒	☒		
Measure	2.1.1	PM 5	PM 5	☐	☒		Numeric	100

Display Type: All

Back Save Refresh

Step	Action
72.	Note: Available Performance Measure options are: • Attachment • Date • Numeric • Text/Comment • Yes/No In this example, on the Performance Measure row, we will select the Performance Measure Response Type drop-down list and select the Numeric option.
73.	Enter the applicable value into the Numeric (Target/Goal) field. In this example, we will enter 100 in the Numeric (Target/Goal) field.
74.	Click the Save button.
75.	Click the Back button.

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Step	Action
76.	Click the Return to Bid Response link.

Step	Action
77.	Note: The amount entered in the Your Unit Bid Price field must equal the total Grant Funds Requested amount for the period, in order to submit the bid response. In this example, we will enter 20,000 in the Your Unit Bid Price field.
78.	When you are ready to submit your bid response, click the Submit Bid button.

SFS Handbook: Grantee Processing in SFS

Are you done making changes and would like to post this bid? (18058,398)

Warning: Response may NOT be edited after posting. If you are not planning to make anymore changes to this bid press "Yes", otherwise press "No" and choose "Save For Later".

Step	Action
79.	In the resulting popup, click the Yes button to confirm you would like to submit the bid. Note: Error messages will display on the page if any required field(s) are left blank upon submitting a bid response. The error messages will state which field(s) require a response.
80.	You have successfully completed the Respond to Bid Event Performance Budget Types topic.

Respond to Bid Event Capital Budget Types

Topic Description:

This topic provides the knowledge and skills to respond to Bid Event Capital Budget Types. Budget types dictate the grant opportunity attributes available for each section of a period budget. Capital budget types allow grantees to record costs related to capital spending on the bid event and grant contract.

Topic Objectives:

In this topic, you will learn:

- How to respond to Bid Event Capital Budget Types

SFS role(s) required to perform this task:

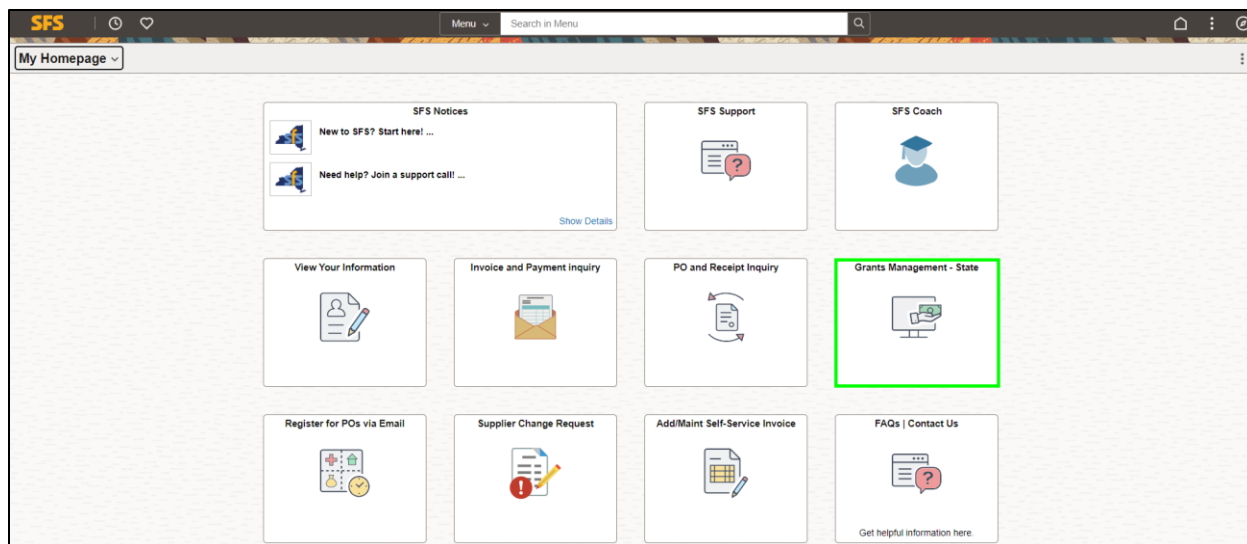
- Bid Response Initiator (NY_GM_VENDOR_EVENT_INITIATE)
 - **Note:** This role allows you to initiate a bid response to a bid event but not submit the bid response to the agency.
- Bid Response Submitter (NY_GM_VENDOR_EVENT_SUBMIT)
 - **Note:** This role allows you to both initiate a bid response and submit a bid response to the agency.

Procedure

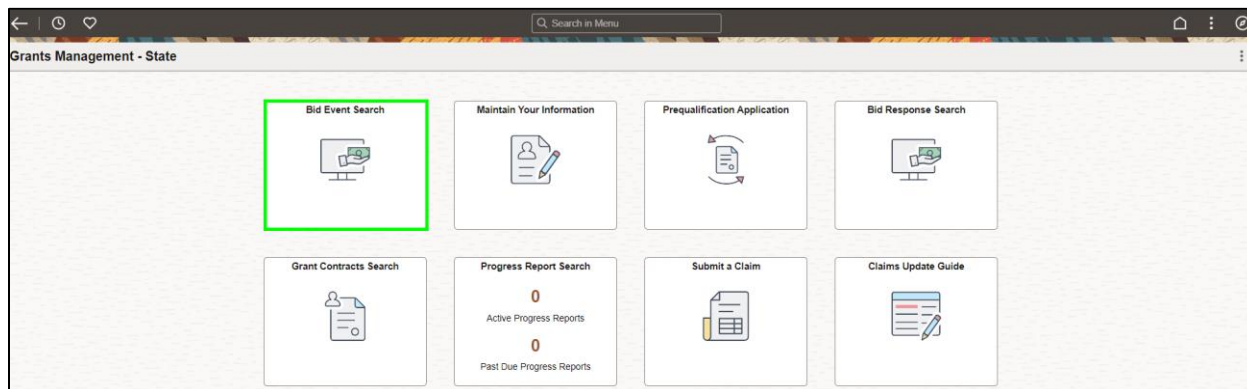
Scenario: You will log in to the SFS Vendor Portal, search for an available bid event (grant opportunity) and respond to the agency questions. You will also enter your budget, work plan information, and your bid price before submitting to the agency for review.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

SFS Handbook: Grantee Processing in SFS



Step	Action
1.	Preferred Navigation: Click the Grant Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > View Events and Place Bids  Note: You must log in to the SFS Vendor Portal to respond to a bid event.



Step	Action
2.	Click the Bid Event Search tile.

SFS Handbook: Grantee Processing in SFS

← | ⌚ | ♥

View Events and Place Bids

Welcome, Outreach Organization
User: John Doe

Enter search criteria to locate an event for viewing or placing bids.

Search Criteria

Event ID

Search by Grant Opportunity

Search by Due Date

Search by Status

Search by Eligibility

Search by Funding Agency

Search by Service Area

From

To

Available

Not-For-Profit

Search

Clear Criteria

Search Results

Event ID	Funding Agency	Grant Opportunity	Status	Eligibility	Availability Date	Anticipated Release Date
EVT0000001	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/17/24 2:01PM	04/17/24 2:01PM
EVT0000002	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/18/24 9:56AM	04/18/24 9:56AM
EVT0000003	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/19/24 9:18AM	04/19/24 9:18AM

Step	Action
3.	Enter the applicable search criteria in the Search Criteria fields. In this example, we will select the Search by Status field drop-down list and click Available from the list.
4.	Click the Search button. Search
5.	Click an Event ID link to initiate a bid response.

← | ⌚ | ♥

Event Details

Welcome, Outreach Organization
User: John Doe

Information On Inquiry Options

Accept Invitation

Decline Invitation

Bid on Event

Bidding Shortcuts:
[View Event Activity](#)
[View Event Package](#)
[Upload XML Bid Response](#)

Event Name

Event ID

Event

Format/Type

Event Round

Event Version

Event Start Date

Event End Date

Event Description

Contact

Phone

Email

Online Discussion

Live Chat Help

Payment Terms

My Bids

Edits to Submitted Bids

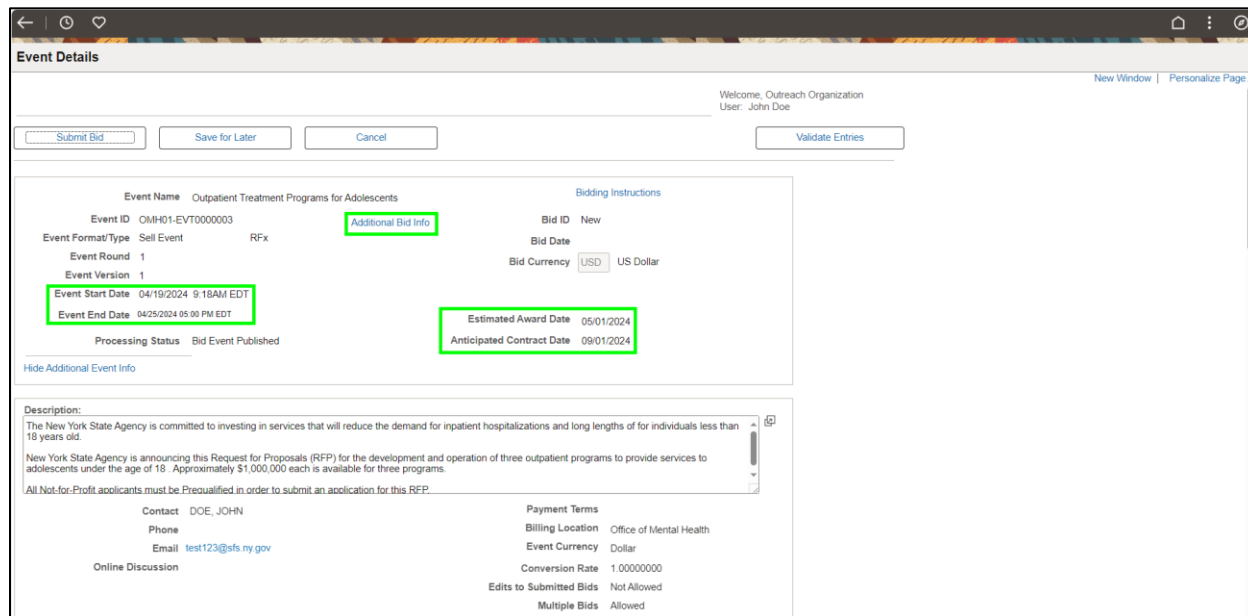
Multiple Bids

Not Allowed

Allowed

SFS Handbook: Grantee Processing in SFS

Step	Action
6.	Click the Bid on Event button. 



Event Details

Welcome, Outreach Organization User: John Doe

[Submit Bid](#) [Save for Later](#) [Cancel](#) [Validate Entries](#)

Event Name: Outpatient Treatment Programs for Adolescents **Bidding Instructions**

Event ID: OM/H01-EVT000003 **Additional Bid Info** **Bid ID:** New

Event Format/Type: Sell Event **RFx** **Bid Date:**

Event Round: 1 **Bid Currency:** USD US Dollar

Event Version: 1 **Event Start Date:** 04/19/2024 9:18AM EDT

Event End Date: 04/25/2024 05:00 PM EDT **Estimated Award Date:** 05/01/2024

Processing Status: Bid Event Published **Anticipated Contract Date:** 09/01/2024

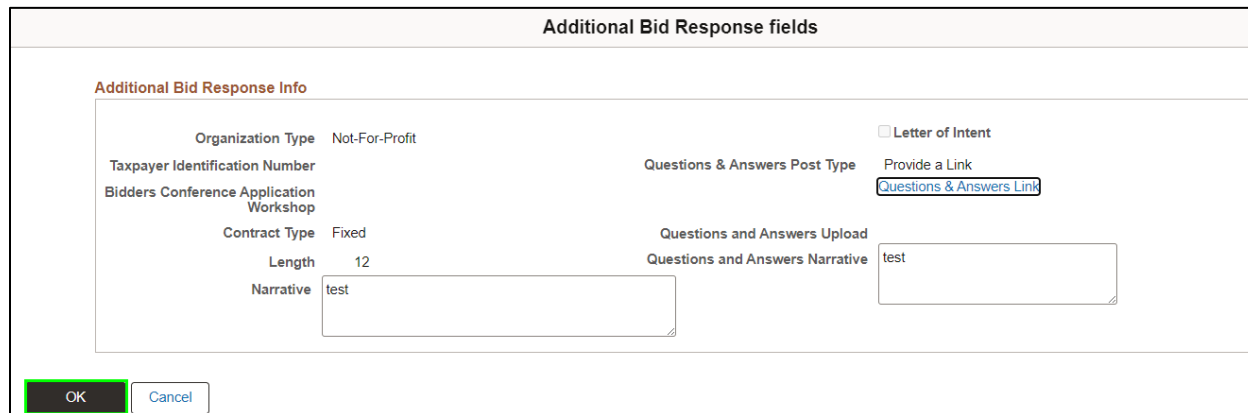
[Hide Additional Event Info](#)

Description:
The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of stay for individuals less than 18 years old.
New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.
All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact: DOE, JOHN
Phone:
Email: test123@sfs.ny.gov
Online Discussion:

Payment Terms:
Billing Location: Office of Mental Health
Event Currency: Dollar
Conversion Rate: 1.00000000
Edits to Submitted Bids: Not Allowed
Multiple Bids: Allowed

Step	Action
7.	Review the Event Start , Event End Date , Estimated Award Date , Anticipated Contract Date fields.
8.	Click the Additional Bid Info link.



Additional Bid Response fields

Additional Bid Response Info

Organization Type: Not-For-Profit ☐ **Letter of Intent**

Taxpayer Identification Number: **Questions & Answers Post Type:** Provide a Link [Questions & Answers Link](#)

Bidders Conference Application: Workshop

Contract Type: Fixed **Questions and Answers Upload:** test

Length: 12 **Questions and Answers Narrative:** test

Narrative: test

OK [Cancel](#)

SFS Handbook: Grantee Processing in SFS

Step	Action
9.	Review the Additional Bid Info. Click the OK button to return to the Event Details page.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event 1
 Lines Responded To 0
 Your Total Line Pricing 0.0000 USD

[Hide Line Detail](#)

★ Bid Required [Line Comments/Files](#)

Lines

1-1 of 1 [View All](#)

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price	
1	Period Details -1		Line 1	EA			Comment

[Event Comments and Attachments](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Return to Event Search](#)

Step	Action
10.	Select the Events Comments and Attachments link, located at the bottom of the page, to view any instructions and view/add any attachments and/or comments. You may need to scroll to see this link.

SFS Handbook: Grantee Processing in SFS

Event Comments and Attachments

Attached File	Attachment Description	View
Budget Worksheets_-_MWRR_Capital_Projects.pdf	Budget Worksheets	View
EO_16.pdf	EO 16	View
Attachment_S.pdf	Attachment S	View
Vehicle_Information_Form.pdf	Vehicle Information Form	View
Attachment_S.pdf	Attachment S	View
Certificate_as_to_Title_Form.pdf	Certificate as to Title Form	View

Add New Attachments

Attached File	Attachment Description	Upload	View		
		Upload	View	Add New Attachments	Delete

Comments

Add New Comments

OK Cancel

Step	Action
11.	Click the View button to view any attached documents.
12.	Click the Upload button under the Add New Attachments section to attach additional document(s). Note: Per agency guidance, you could be required to upload an attachment specified in the bid factor section of a bid response.

File Attachment

Choose File
No file chosen

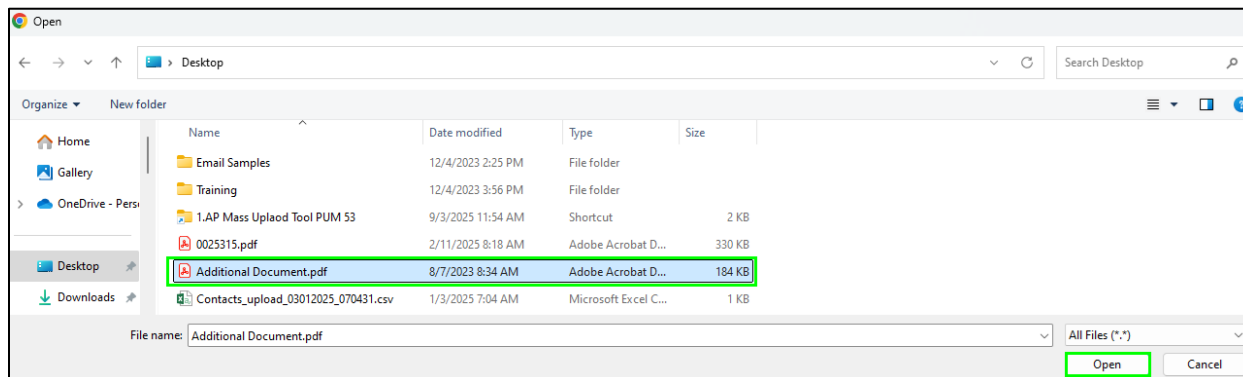
Upload

Cancel

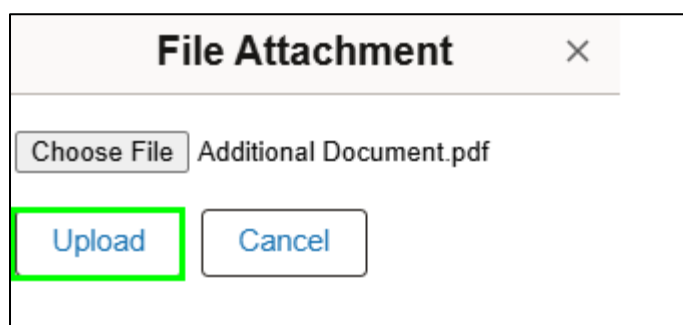
Step	Action
------	--------

SFS Handbook: Grantee Processing in SFS

13.	Click the Choose File button.
-----	--------------------------------------



Step	Action
14.	Select the document that you like to upload and then click the Open button.



Step	Action
15.	Click the Upload button to upload and attach the document.

SFS Handbook: Grantee Processing in SFS

Event Comments and Attachments

Attached File	Attachment Description	View
Budget_Worksheets_-_MWRR_Capital_Projects.pdf	Budget Worksheets	View
EO_16.pdf	EO 16	View
Attachment_S.pdf	Attachment S	View
Vehicle_Information_Form.pdf	Vehicle Information Form	View
Attachment_S.pdf	Attachment S	View
Certificate_as_to_Title_Form.pdf	Certificate as to Title Form	View

Add New Attachments

Attached File	Attachment Description	Upload	View		
Additional_Document.pdf	Additional Document	Upload	View	Add New Attachments	Delete

Comments

Add New Comments

OK

Cancel

Step	Action
16.	If needed, enter a description of the attached document in the Attachment Description field.
17.	Click the View button to view the newly attached document.
18.	Click the Add New Attachments link to upload additional documents.
19.	Click the Delete link to remove a corresponding attached document.
20.	Enter new comments in the Add a New Comments field.
21.	Click the OK button to return to the Event Details page.

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Event Details

Event ID: OM-H01-EVT0000003 [Additional Bid Info](#) Bid ID: New

Event Format/Type: Sell Event RFX Bid Date:

Event Round: 1 Bid Currency: USD US Dollar

Event Version: 1

Event Start Date: 04/19/2024 9:18AM EDT Estimated Award Date: 05/01/2024

Event End Date: 04/25/2024 05:00 PM EDT Anticipated Contract Date: 09/01/2024

Processing Status: Bid Event Published

[Hide Additional Event Info](#)

Description:

The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of stay for individuals less than 18 years old.

New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.

All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact: DOE, JOHN

Phone:

Email: test123@sfs.ny.gov

Online Discussion

Payment Terms

Billing Location: Office of Mental Health

Event Currency: Dollar

Conversion Rate: 1.00000000

Edits to Submitted Bids: Not Allowed

Multiple Bids: Allowed

Step 1: Answer General Event Questions

The event administrator requests your response to questions not specific to any specific item.

General Event Questions: 5

Required Questions: 5

Questions Responded To: 0

DUNS Number:

Organization Website:

User Name: Doe, John

[Site/Project Address](#)

Bidder Contact Information

Name:

Telephone:

Email:

[Hide Event Questions](#)

Step	Action
22.	Use the scrollbar to navigate to the Step 1: Answer General Event Questions section.
23.	If applicable, enter your Organization Website in the Organization Website field. This field is optional and not required.
24.	Under the Bidder Contact Information , enter the following information: Name Telephone Email Note: The contact listed should be the person/people within the NFP who can be contacted with questions about the bid response
25.	Click the Site/Project Address link.

SFS Handbook: Grantee Processing in SFS

Bid Response address fields

Site/Project Address

|

<

<

1 of 1

>

>

|

View All

+

-

Address Line 1

10 Tester Lane

Address Line 2

City

Albany

Postal Code

12345

State

NY

OK

Cancel

Step	Action
26.	Enter Address Details, including the following information: • Address Line 1 • Address Line 2 (if applicable) • City • Postal Code • State Note: The Site/Project Address is where the grant will be used, or funds will be spent.
27.	When you have finished entering address details, click the OK button.

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Event Details

Event Questions

★ Bid Required ★ Ideal Response Required

General Questions

★

How many clients do you anticipate servicing in the first year of programming?

Response

Best 0
Worst 0

Weighting
Add Comments or Attachments

★

Provide intake form for incoming clients.

[Enter File Attachment Response](#)

★

Describe the agency's experience serving adolescents with serious mental illness. Describe any outpatient programming that the agency has operated in the past.

Response

★

Choose the types of service you will provide during outpatient programming. If you choose medication management, please upload a copy of the MD's license who will be supervising.

Response

Weighting
Add Comments or Attachments

Step	Action
28.	Review and respond to Event Questions. Those that are flagged as Required (*) must be responded to in order to submit a bid response. Note: - Text responses are limited to 2,000 characters. Comments/Attachments can be utilized to add additional text if the 2,000-character limit is met. - The ability to add a Comment/Attachment will vary based on the question.

Event Details

Welcome, Outreach Organization
User: John Doe

Message not found

[Submit Bid](#) [Save for Later](#) [Cancel](#) [Validate Entries](#)

Event Name: Outpatient Treatment Programs for Adolescents

Event ID: OMH01-EVT0000003

Event Format/Type: Sell Event

Event Round: 1

Event Version: 1

Event Start Date: 04/19/2024 9:18AM EDT

Event End Date: 04/25/2024 05:00 PM EDT

Processing Status: Bid Event Published

Bidding Instructions

Bid ID: 1

Bid Date:

Bid Currency: USD US Dollar

Estimated Award Date: 05/01/2024

Anticipated Contract Date: 09/01/2024

Description:

The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of stay for individuals less than 18 years old. New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs. All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact: DOE, JOHN

Phone: test123@sfs.ny.gov

Email: test123@sfs.ny.gov

Online Discussion

Payment Terms

Billing Location: Office of Mental Health

Event Currency: Dollar

Conversion Rate: 1.00000000

Edits to Submitted Bids: Not Allowed

Multiple Bids: Allowed

SFS Handbook: Grantee Processing in SFS

Step	Action
29.	Click the Save for Later button.

The bid is not complete. (18058,342)

If you would like to save your bid for submittal at a later time, select "OK". If not, select "Cancel" to return to the bid response pages so that you can continue editing your bid.

Step	Action
30.	In the resulting popup, click the OK button to save your progress. Note: Error messages will display on the page if any required field(s) are left blank upon saving a bid response. The error messages will state which field(s) require a response.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event 1
 Lines Responded To 0
 Your Total Line Pricing 0.0000 USD

[Hide Line Detail](#)

★ Bid Required [Line Comments/Files](#)

Lines

1-1 of 1 [View All](#)

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price	
1	Period Details - 1		Line 1	EA			Comment

Step	Action
31.	Scroll to the bottom of the page. Under the Lines section, click the Period Details - 1 link under the Period column to access budget and work plan information.

SFS Handbook: Grantee Processing in SFS

Create Bids

Business Unit: OMH01 Budget Type: CAPITAL
 Event ID: EVT0000003 Funded Amount: 3000000.000
 Bidder Setid: SHARE Period: 1 Bidder ID: 1100314197

Bid Event Periods

Period: 1
 Period From: 09/01/2024 Period To: 08/31/2025
☐ Budget Required [Budget properties](#)
☐ Work Plan Required [Work Plan Properties](#)

Bid Event Line#: 1

[Return to Bid Response](#)

Step	Action
32.	Click the Budget properties link.

Budget Properties Header

Event ID: EVT0000003 Max Award Amount: 3000000.000
 Bid Event Period: 1 Period From Date: 09/01/2024
 Bidder/Vendor ID: 1100314197 Period To Date: 08/31/2025
 Budget Type: CAPITAL

Budget Properties

Apply Match: Allowed at Category I
 Calculate Match: Grant Fund
 Overage %:

Budget Category Properties

Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage
1 SCOPING & PRE-DEVELOPMENT	☒	☐	0	☐	☐	
2 DESIGN	☒	☐	0	☐	☐	
3 ACQUISITION	☐	☐	0	☐	☐	
4 CONSTRUCTION	☐	☐	0	☐	☐	
5 ADMINISTRATION	☐	☐	0	☐	☐	

Step	Action
33.	Review the Budget Header Information . This section was completed by the agency.

SFS Handbook: Grantee Processing in SFS

34.	Review Budget Category Property section (including Narrative), noting which rows have Available in Grant checked. Note: This section was completed by the agency to help the grantee understand which Budget Category(s) require a response. Grantees will need to scroll down to view the sections they are responsible for updating.
-----	---

Budget Properties Header

Narrative

Period Budget Summary

1-7 of 7

[View All](#)

	Budget Category	Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SCOPING & PRE-DEVELOPMENT	0.00	0.00	0	0	0.00	0.00	
2	DESIGN	0.00	0.00	0	0	0.00	0.00	
3	ACQUISITION	0.00	0.00	0	0	0.00	0.00	
4	CONSTRUCTION	0.00	0.00	0	0	0.00	0.00	
5	ADMINISTRATION	0.00	0.00	0	0	0.00	0.00	
6	WORKING CAPITAL/RESERVES	0.00	0.00	0	0	0.00	0.00	
7	OTHER	0.00	0.00	0	0	0.00	0.00	

Sub Totals

Grants Funds	0.00	Match % Calc	0.00
Match Funds	0.00	Other Funds	0.00
Total	0.00		

[Back](#)

[Save](#)

Step	Action
35.	Under the Period Budget Summary section, click on View All icon to show all budget categories. In this example, we will enter budget information for the Scoping & Pre-development and Design budget categories.
36.	Under the Period Budget Summary section, click on Category Details icon for the Scoping & Pre-development budget category. Note: Where the icon cannot be clicked, the agency has not checked the Available in Grant checkbox above.

SFS Handbook: Grantee Processing in SFS

Category Details

Budget Type CAPITAL
Budget Category SCOPING & PRE-DEVELOPMENT

Match % Required

Category Details

☐ ☐

1-1 of 1 View All

	Type/Description	Grant Funds	Match Funds	Match %	Other funds
1					

Category Totals

Cumulative Grant Funds 0.00

Cumulative Match Funds 0.00

Cumulative Other Funds 0.00

Cumulative Category Details Totals 0.00

Narrative

OK

Cancel

Step	Action
37.	Leave the Type/Description field blank.
38.	Enter the applicable value into the Grant Funds field. In this example, we will enter 10,000 in the Grant Funds field.
39.	Enter the applicable value into the Match Funds field. In this example, we will leave this field blank.
40.	Enter the applicable value into the Other Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move on to the next step.

SFS Handbook: Grantee Processing in SFS

Step	Action
41.	Enter the applicable value into the Narrative field. Note: The narrative could be additional information for the agency or could be used to summarize the changes you made. In this example, we will leave this field blank.
42.	Click the OK button.
43.	Under the Period Budget Summary section, click on Category Details icon for the Design budget category.
44.	Leave the Type/Description field blank.
45.	Enter the applicable value into the Grant Funds field. In this example, we will enter 10,000 in the Grant Funds field.
46.	Enter the applicable value into the Match Funds field. In this example, we will leave this field blank.
47.	Enter the applicable value into the Other Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move onto next step.
48.	Enter the applicable value into the Narrative field. Note: The narrative could be additional information for the agency or could be used to summarize the changes you made. In this example, we will leave this field blank.
49.	Click the OK button.

SFS Handbook: Grantee Processing in SFS

Budget Properties Header

Narrative

Period Budget Summary

☐ ☐

1-7 of 7 View 5

	Budget Category	Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SCOPING & PRE-DEVELOPMENT	10000.00	0.00	0	0	0.00	10000.00	
2	DESIGN	10000.00	0.00	0	0	0.00	10000.00	
3	ACQUISITION	0.00	0.00	0	0	0.00	0.00	
4	CONSTRUCTION	0.00	0.00	0	0	0.00	0.00	
5	ADMINISTRATION	0.00	0.00	0	0	0.00	0.00	
6	WORKING CAPITAL/RESERVES	0.00	0.00	0	0	0.00	0.00	
7	OTHER	0.00	0.00	0	0	0.00	0.00	

Sub Totals

Grants Funds	20000.00	Match % Calc	0.00
Match Funds	0.00	Other Funds	0.00
Total	20000.00		

Back
Save

Step	Action
50.	Click the Save button.
51.	Click the Back button.

← | 🕒 | ❤️
🏠 | ⋮ | 🔄

Create Bids
New Window | Personalize Page

Business Unit: OMH01 Budget Type: CAPITAL
 Event ID: EVT00000003 Funded Amount: 3000000.000
 Bidder Setid: SHARE Period: 1 Bidder ID: 1100314197

Bid Event Periods

| 1 of 1 | View All

Period: 1
 Period From: 09/01/2024 Period To: 09/31/2025

☒ Budget Required [Budget properties](#)
☒ Work Plan Required [Work Plan Properties](#)

| 1 of 1 | View All

Bid Event Line#: 1

[Return to Bid Response](#)

Step	Action
52.	Click the Work Plan Properties link.

SFS Handbook: Grantee Processing in SFS

Create Bids

Work Plan

Work Plan Header

Event ID: EVT0000003 Business Unit: OMH-01 WorkPlan ID: EVT0000003-R1V1P1-1100314197-23
 Bidder ID: 1100314197 Period From: 09/01/2024 Period To: 08/31/2025 Period: 1
[Work Plan Overview](#)
[Work Plan Overview Report](#)

Allow Bidder Defined Objective and Tasks: ☒

Maximum Number of:

Objectives: 50
 Tasks: 100
 Performance Measures: 300

Online Work Plan Required: ☐

Project Summary

Paragraph

Step	Action
53.	Review the Work Plan Header information and verify the Allow Bidder Defined Objectives and Tasks is selected.
54.	Note: If the Allow Bidder Defined Objectives & Tasks box is checked and the Maximum Number of Objectives, Tasks, and Performance Measures have not already been entered, then you can add new objective, tasks, and performance measures if needed.
55.	Enter the applicable value into the Project Summary field.

Objectives >> Tasks >> Performance Measures

Objective **Task** **Perf. Measure**

Display Type: All

1-9 of 9 View All

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
☒	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☒	☒
☐	Task	1.1	Hire staff to operate program	Hire staff to operate program	☒	☒
☐	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☒	☒
☐	Task	1.2	Obtain Office Space	Obtain Office Space	☒	☒
☐	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	☒	☒
☐	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	☒	☒
☐	Performance Measure	1.3.1	List referring agencies	List referring agencies	☒	☒
☐	Performance Measure	1.3.2	Describe referral process	Describe referral process	☒	☒
☐	Objective	2	Objective 2	Objective 2	☐	☒

Objective **Task** **Perf. Measure**

Display Type: All

Back Save Refresh

SFS Handbook: Grantee Processing in SFS

Step	Action
56.	In this example, we will add additional rows in the Objectives >> Tasks >> Performance Measures section. Note: The First Objective with the underlying Task and Performance Measure in the list was entered by the agency. Click on the Objective row to add additional objectives.
57.	Click the + Objective button.
58.	On the Objective row, enter the applicable value in the Name field.
59.	On the Objective row, enter the applicable value in the Description field.

The screenshot shows the SFS interface with the 'Task' tab selected. The table displays a list of objectives and tasks. The 'Task' row for 'Task 4' is highlighted with a green box. The 'Objective' row for 'Objective 2' is also highlighted with a green box. The 'Name' and 'Description' fields for 'Task 4' are highlighted with green boxes.

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
☐	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☒	☒
☐	Task	1.1	Hire staff to operate program	Hire staff to operate program	☒	☒
☐	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☒	☒
☐	Task	1.2	Obtain Office Space	Obtain Office Space	☒	☒
☐	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	☒	☒
☐	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	☒	☒
☐	Performance Measure	1.3.1	List referring agencies	List referring agencies	☒	☒
☐	Performance Measure	1.3.2	Describe referral process	Describe referral process	☒	☒
☒	Objective	2	Objective 2	Objective 2	☐	☒
☐	Task	2.1	Task 4	Task 4	☐	☒

Step	Action
60.	Select the Objective row where the task will be added.
61.	Click + Task button.
62.	On the Task row, enter the applicable value in the Name field.
63.	On the Task row, enter the applicable value in the Description field.

SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures

Objective Task **Perf. Measure** Display Type: All

1-11 of 11 View All

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
☐	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☐	☒
☐	Task	1.1	Hire staff to operate program	Hire staff to operate program	☐	☒
☐	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☐	☒
☐	Task	1.2	Obtain Office Space	Obtain Office Space	☐	☒
☐	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	☐	☒
☐	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	☐	☒
☐	Performance Measure	1.3.1	List referring agencies	List referring agencies	☐	☒
☐	Performance Measure	1.3.2	Describe referral process	Describe referral process	☐	☒
☐	Objective	2	Objective 2	Objective 2	☐	☒
☒	Task	2.1	Task 4	Task 4	☐	☒
☐	Performance Measure	2.1.1	Performance Measure 5	Performance Measure 5	☐	☒

Objective Task **Perf. Measure** Display Type: All

Step	Action
64.	Select the Task row where the performance measure will be added.
65.	Click + Performance Measure button.
66.	On Performance Measure row, enter the applicable value in the Name field.
67.	On Performance Measure row, enter the applicable value in the Description field.

SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures

Objective Task Perf. Measure Display Type: All

1-11 of 11 View All

Basic Info More Details **▶**

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
1	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☐	☐
2	Task	1.1	Hire staff to operate program	Hire staff to operate program	☐	☐
3	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☐	☐
4	Task	1.2	Obtain Office Space	Obtain Office Space	☐	☐
5	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	☐	☐
6	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	☐	☐
7	Performance Measure	1.3.1	List referring agencies	List referring agencies	☐	☐
8	Performance Measure	1.3.2	Describe referral process	Describe referral process	☐	☐
9	Objective	2	Objective 2	Objective 2	☐	☐
10	Task	2.1	Task 4	Task 4	☐	☐
11	Performance Measure	2.1.1	Performance Measure 5	Performance Measure 5	☐	☐

Objective Task Perf. Measure Display Type: All

Step	Action
68.	Click the arrow to the right of the More Details tab to expand the view and see all fields.

Sort Order	Name	Description	Required	Allowed to Sort	Allow Performance Measure	Perf Measure Response Type	Numeric (Target/Goal)
1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	☐	☐			
1.1	Hire staff to operate program	Hire staff to operate program	☐	☐	☐		
1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	☐	☐	☐	Numeric	5
1.2	Obtain Office Space	Obtain Office Space	☐	☐	☐		
1.2.1	Upload a copy of your lease	Upload a copy of your lease	☐	☐	☐	Attachment	
1.3	Define referral strategy and procedure	Define referral strategy and procedure	☐	☐	☐		
1.3.1	List referring agencies	List referring agencies	☐	☐	☐	Text/Comment	
1.3.2	Describe referral process	Describe referral process	☐	☐	☐	Text/Comment	
2	Objective 2	Objective 2	☐	☐			
2.1	Task 4	Task 4	☐	☐	☐		
2.1.1	PM 5	PM 5	☐	☐	☐	Numeric	100

Display Type: All

Back Save Refresh

Step	Action
69.	Note: Available Performance Measure options are: - Attachment - Date - Numeric - Text/Comment

SFS Handbook: Grantee Processing in SFS

Step	Action
	Yes/No In this example, on the Performance Measure row, we will select the Performance Measure Response Type drop-down list and select the Numeric option.
70.	Enter the applicable value into the Numeric (Target/Goal) field. In this example, we will enter 100 in the Numeric (Target/Goal) field.
71.	Click the Save button.
72.	Click the Back button.

Step	Action
73.	Click the Return to Bid Response link.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 1
Lines Responded To: 0
Your Total Line Pricing: 0.0000 USD

[Hide Line Detail](#)

★ Bid Required [Line Comments/Files](#)

Lines

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price	
1	Period Details --1		Line 1	EA	20000		

[Event Comments and Attachments](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Submit Bid](#)
[Save for Later](#)
[Validate Entries](#)

SFS Handbook: Grantee Processing in SFS

Step	Action
74.	Note: The amount entered in the Your Unit Bid Price field must equal the total Grant Funds Requested amount for the period, in order to submit the bid response. In this example, we will enter 20,000 in the Your Unit Bid Price field.
75.	When you are ready to submit your bid response, click the Submit Bid button.

Are you done making changes and would like to post this bid? (18058,398)

Warning: Response may NOT be edited after posting. If you are not planning to make anymore changes to this bid press "Yes", otherwise press "No" and choose "Save For Later".

Step	Action
76.	In the resulting popup, click the Yes button to confirm you would like to submit the bid. Note: Error messages will display on the page if any required field(s) are left blank upon submitting a bid response. The error messages will state which field(s) require a response.
77.	You have successfully completed the Respond to Bid Event Capital Budget Types topic.

Using the Match Worksheet for a Bid Response

Topic Description:

This topic provides the knowledge and skills to use the Match Worksheet for a Bid Response. The Match Worksheet allows grantees to provide details on budget amounts that have been entered. The ability to use the Match Worksheet will vary based on the agency.

Topic Objectives:

In this topic, you will learn:

- How to use the Match Worksheet for a Bid Response

SFS role(s) required to perform this task:

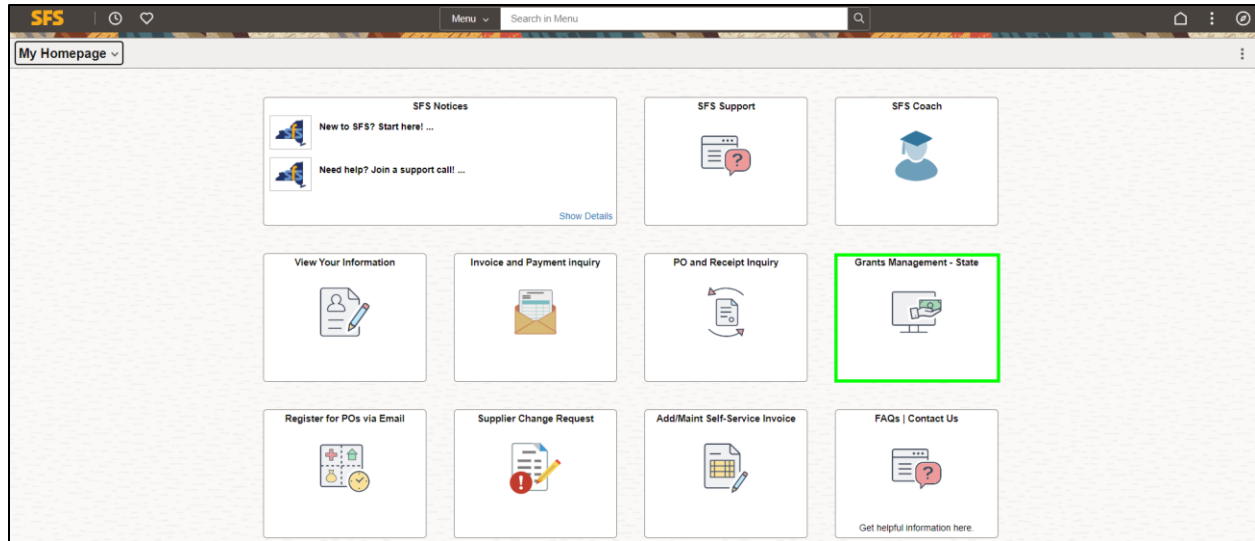
- Bid Response Initiator (NY_GM_VENDOR_EVENT_INITIATE)
 - **Note:** This role allows you to initiate a bid response to a bid event but not submit the bid response to the agency.
- Bid Response Submitter (NY_GM_VENDOR_EVENT_SUBMIT)
 - **Note:** This role allows you to both initiate a bid response and submit a bid response to the agency.

Procedure

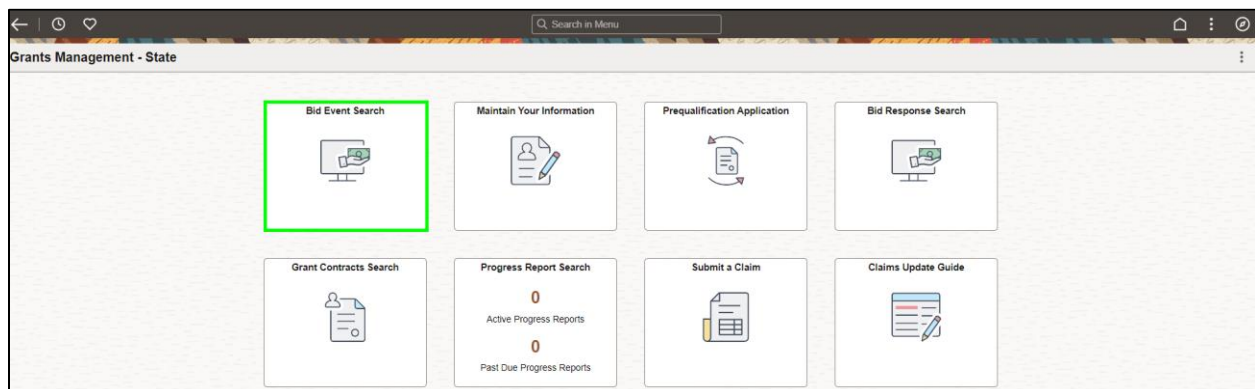
SFS Handbook: Grantee Processing in SFS

Scenario: You have a bid response already saved and in process. You will use the match worksheet to provide details on the budget amounts that have already been entered.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



Step	Action
1.	Preferred Navigation: Click the Grant Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > View Events and Place Bids 
	Note: You must log in to the SFS Vendor Portal to respond to a bid event.



SFS Handbook: Grantee Processing in SFS

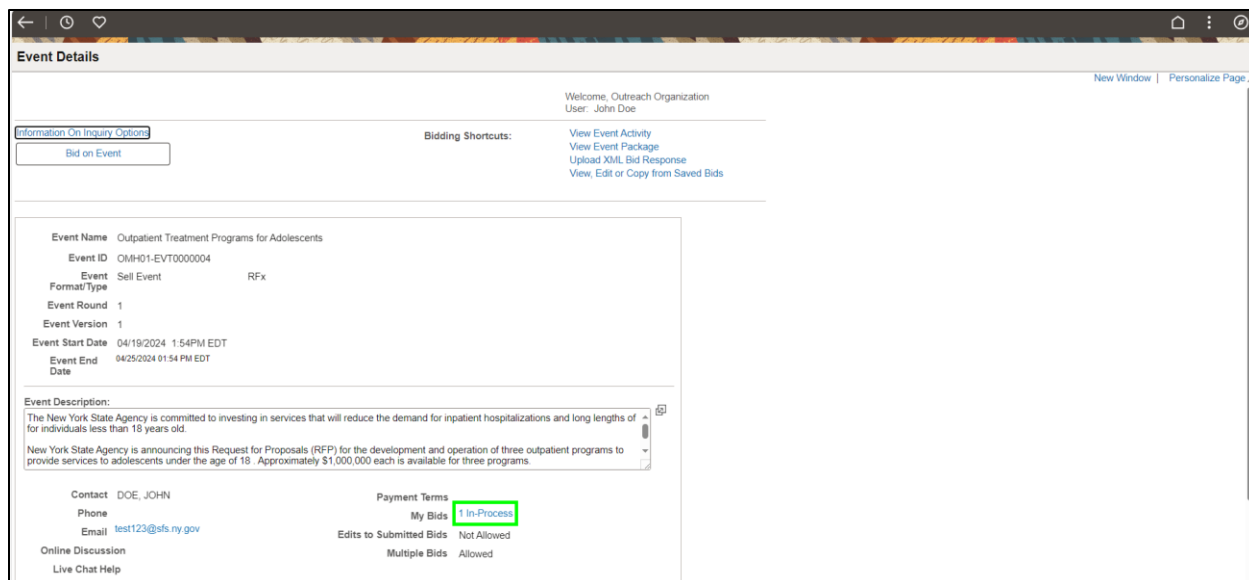
Step	Action
2.	Click the Bid Event Search tile.

The screenshot shows a web application titled "View Events and Place Bids". It features a "Search Criteria" section with a green border around the input fields. The criteria include: Event ID, Search by Grant Opportunity, Search by Due Date (From/To), Search by Status (set to "Available"), Search by Eligibility (set to "Not-For-Profit"), Search by Funding Agency, and Search by Service Area. A green "Search" button is highlighted. Below the search criteria is a "Search Results" section displaying a table of results.

Event ID	Funding Agency	Grant Opportunity	Status	Eligibility	Availability Date	Anticipated Release Date
EVT0000001	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/17/24 2:01PM	04/17/24 2:01PM
EVT0000002	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/18/24 9:56AM	04/18/24 9:56AM
EVT0000003	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/19/24 9:18AM	04/19/24 9:18AM
EVT0000004	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/19/24 1:54PM	04/19/24 1:54PM

Step	Action
3.	Enter the applicable search criteria in the Search Criteria fields. In this example, select the Search by Status field drop-down list and click Available from the list.
4.	Click the Search button. 
5.	Click an Event ID link to update an in-process bid response. In this example, we will click the Bid Event EVT0000004 link to update a bid response.

SFS Handbook: Grantee Processing in SFS



Event Details

Welcome, Outreach Organization
User: John Doe

[Information On Inquiry Options](#)

[Bid on Event](#)

Bidding Shortcuts:

- [View Event Activity](#)
- [View Event Package](#)
- [Upload XML Bid Response](#)
- [View, Edit or Copy from Saved Bids](#)

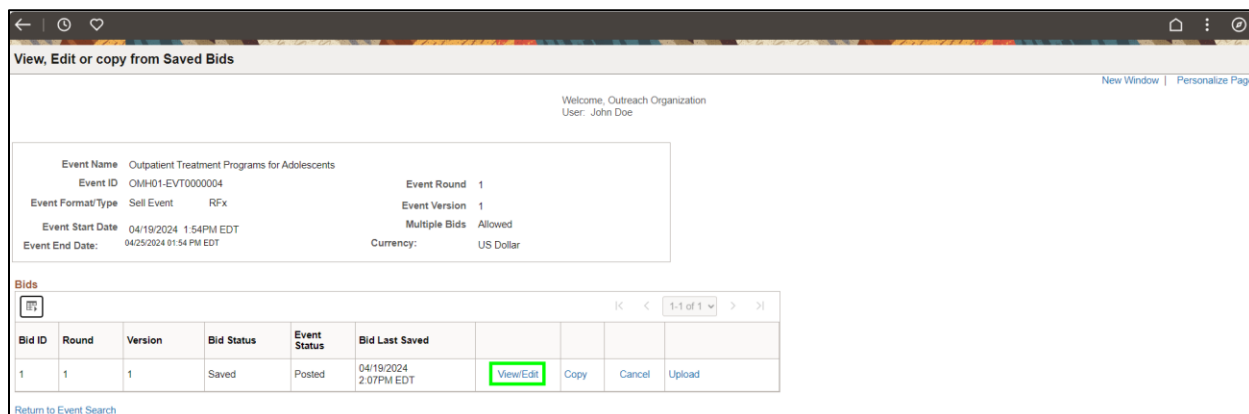
Event Name: Outpatient Treatment Programs for Adolescents
Event ID: OMH01-EVT0000004
Event Format/Type: Sell Event RFX
Event Round: 1
Event Version: 1
Event Start Date: 04/19/2024 1:54PM EDT
Event End Date: 04/25/2024 01:54 PM EDT

Event Description:
 The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of stay for individuals less than 18 years old.
 New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.

Contact: DOE, JOHN
Phone:
Email: best123@sfs.ny.gov
Online Discussion:
Live Chat Help:

Payment Terms:
My Bids: 1 In-Process
Edits to Submitted Bids: Not Allowed
Multiple Bids: Allowed

Step	Action
6.	Click on My Bids In Process link to view your in-process response to this bid event.



View, Edit or copy from Saved Bids

Welcome, Outreach Organization
User: John Doe

Event Name: Outpatient Treatment Programs for Adolescents
Event ID: OMH01-EVT0000004
Event Format/Type: Sell Event RFX
Event Start Date: 04/19/2024 1:54PM EDT
Event End Date: 04/25/2024 01:54 PM EDT
Event Round: 1
Event Version: 1
Multiple Bids: Allowed
Currency: US Dollar

Bids

1-1 of 1

Bid ID	Round	Version	Bid Status	Event Status	Bid Last Saved			
1	1	1	Saved	Posted	04/19/2024 2:07PM EDT	View/Edit	Copy	Cancel

[Return to Event Search](#)

Step	Action
7.	Click the View/Edit link for the applicable bid response you want to view and update.

SFS Handbook: Grantee Processing in SFS

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event 1
Lines Responded To 0
Your Total Line Pricing 0.0000 USD

[Hide Line Detail](#)

★ Bid Required

💬 Line Comments/Files

Lines

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price	
1	Period Details -1		Line 1	EA			

Step	Action
8.	Scroll to the bottom of the page of the existing bid response. Under the Lines section, click the Period Details -1 link under the Period column to access budget and work plan information for this bid response.

← | 🕒 | ❤️

Create Bids New Window | Personalize Page

Business Unit: CMH01 Budget Type: EXPENDITURE
Event ID: EVT0000004 Funded Amount: 3000000.000
Bidder Setid: SHARE Period: 1 Bidder ID: 1100314197

Bid Event Periods | < > 1 of 1 | View All

Period: 1
Period From: 09/01/2024 Period To: 09/31/2025

☐ Budget Required [Budget properties](#)
☐ Work Plan Required [Work Plan Properties](#)

| < > 1 of 1 | View All

Bid Event Line#: 1

[Return to Bid Response](#)

Step	Action
9.	Click the Budget Properties link.

SFS Handbook: Grantee Processing in SFS

Budget Properties Header

Event ID EVT0000004

Bid Event Period 1

Bidder/Vendor ID 1100314197

Max Award Amount 3000000.000

Period From Date 09/01/2024

Period To Date 08/31/2025

Budget Type EXPENDITURE

Budget Properties

Apply Match Allowed at Category I

Calculate Match Grant Fund

☒ Include Match Worksheet [Match Worksheet](#)

Budget Category Properties

1-5 of 10

<
>
|
[View All](#)

	Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage
1	SALARY	☒	☐	0	☐	☐	
2	FRINGE	☒	☐	0	☐	☐	
3	CONTRACTUAL	☐	☐	0	☐	☐	
4	TRAVEL	☐	☐	0	☐	☐	
5	EQUIPMENT	☐	☐	0	☐	☐	

Step	Action
10.	Click the Match Worksheet link.

SFS Handbook: Grantee Processing in SFS

×
Include Match Worksheet

Include Match Worksheet

<<
<
1-1 of 1
>
>>
| View All

	Source of Matching Funds	Describe Match source	Form of Documentation Required	Match Total		
1		v			+	-

Match Worksheet Detail Total 0.00
Budget Detail Match Total 0.00

Narrative

Step	Action
11.	Enter applicable value in the Source of Match Funds field.
12.	Click the Describe Match Source drop-down field and select the applicable value from the list. The options are: Federal , Local , Private , or State .
13.	Enter the applicable value into the Form of Documentation Required field.
14.	Enter the applicable match amounts in the Match Total field. Note: The sum of the Match Total amounts will equal the Match Worksheet Detail Total amount.
15.	Enter any applicable comments in the Narrative field. Note: The narrative could be additional information for the agency or could be used to summarize the changes you made.
16.	Click the OK button.

SFS Handbook: Grantee Processing in SFS

Budget Properties Header

5 EQUIPMENT

0

Narrative

Period Budget Summary

<

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1-5 of 10

View All

	Budget Category	Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SALARY	0.00	0.00	0	0	0.00	0.00	
2	FRINGE	0.00	0.00	0	0	0.00	0.00	
3	CONTRACTUAL	0.00	0.00	0	0	0.00	0.00	
4	TRAVEL	0.00	0.00	0	0	0.00	0.00	
5	EQUIPMENT	0.00	0.00	0	0	0.00	0.00	

Sub Totals

Grants Funds 0.00

Match % Calc 0.00

Match Funds 0.00

Other Funds 0.00

Total 0.00

Back

Save

Step	Action
17.	Click the Save button and then click the Back button.

Create Bids

Business Unit OMH01

Budget Type EXPENDITURE

Event ID EVT0000004

Funded Amount 3000000.000

Bidder Setid SHARE

Period 1

Bidder ID 1100314197

Bid Event Periods

Period 1

Period From 09/01/2024

Period To 08/31/2025

Budget Required

Budget properties

Work Plan Required

Work Plan Properties

Bid Event Line# 1

Return to Bid Response

Step	Action
18.	Click the Return to Bid Response link.

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Event Details' page in the SFS Vendor Portal. At the top, there's a navigation bar with 'Event Details' on the left and 'New Window | Personalize Page' on the right. Below the navigation bar, there's a welcome message: 'Welcome, Outreach Organization User: John Doe'. In the center, there are four buttons: 'Submit Bid', 'Save for Later' (highlighted with a green border), 'Cancel', and 'Validate Entries'. Below the buttons, there's a section titled 'Event Details' with a table of information. The table has two columns: 'Event Details' and 'Additional Bid Info'. The 'Event Details' column contains: Event Name (Outpatient Treatment Programs for Adolescents), Event ID (OMH01-EVT0000004), Event Format/Type (Sell Event), Event Round (1), Event Version (1), Event Start Date (04/19/2024 1:54PM EDT), Event End Date (04/25/2024 01:54 PM EDT), and Processing Status (Bid Event Published). The 'Additional Bid Info' column contains: Bidding Instructions (link), Bid Response PDF (link), Bid ID (1), Bid Date, Bid Currency (USD), US Dollar, Estimated Award Date (05/01/2024), and Anticipated Contract Date (09/01/2024). At the bottom left, there's a link 'Hide Additional Event Info'.

Step	Action
19.	Click the Save for Later button.
20.	You have successfully completed the Using the Match Worksheet for a Bid Response topic.

View Submitted Bid Responses

Topic Description:

This topic provides the knowledge and skills to view bid responses that have been submitted by your organization in the SFS Vendor Portal.

Topic Objectives:

In this topic, you will learn:

- How to view submitted bid responses.

SFS role(s) required to perform this task:

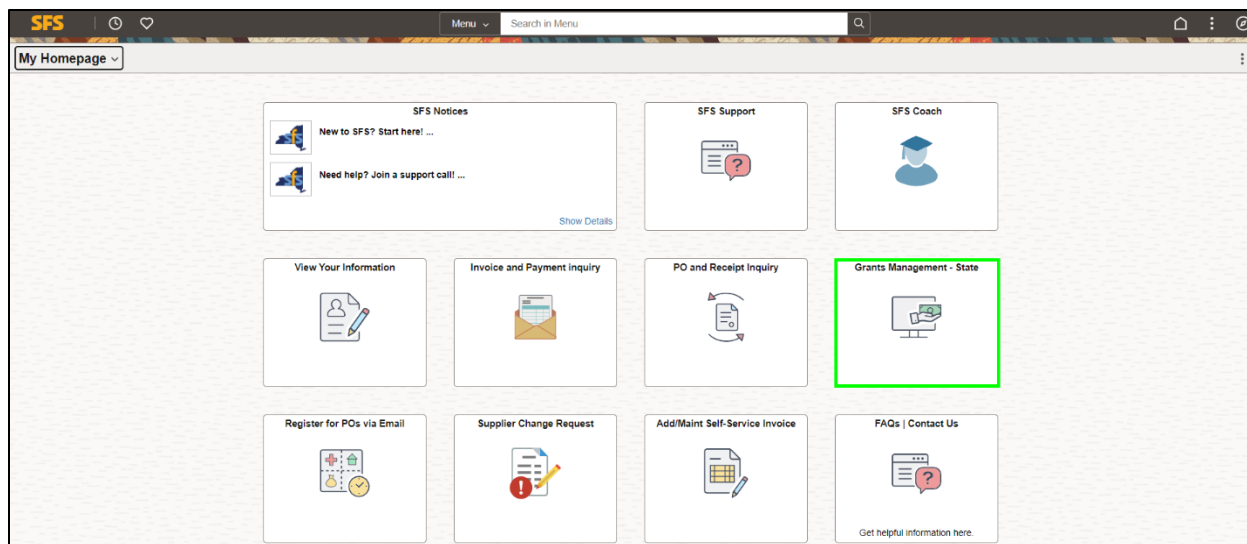
- Bid Response Initiator (NY_GM_VENDOR_EVENT_INITIATE) **or**
 - **Note:** This role allows you to initiate a bid response to a bid event but not submit the bid response to the agency.
- Bid Response Submitter (NY_GM_VENDOR_EVENT_SUBMIT)
 - **Note:** This role allows you to both initiate a bid response and submit a bid response to the agency.

Procedure

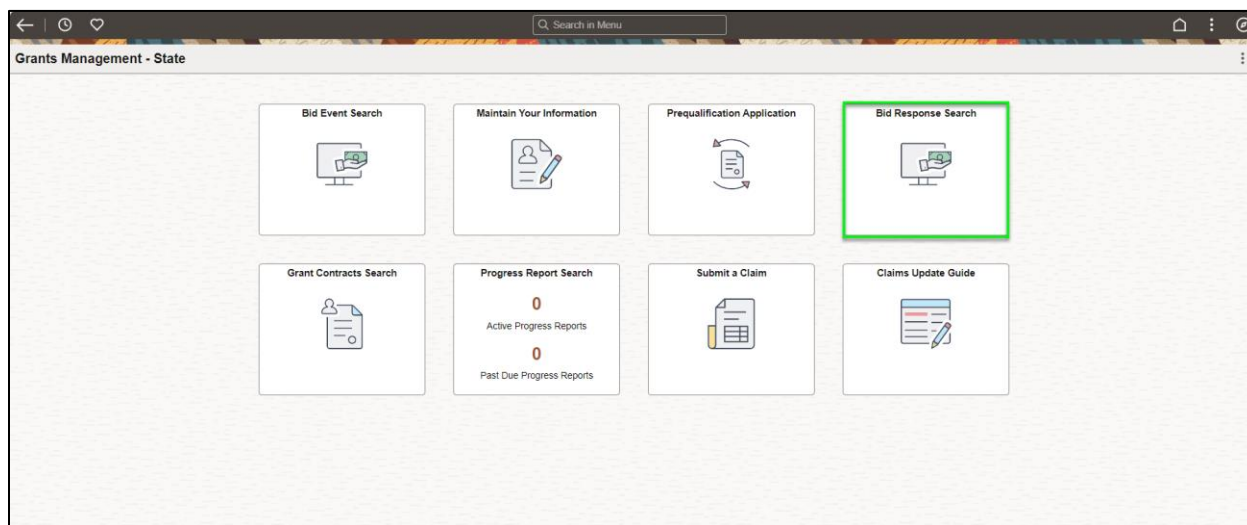
Scenario: You have recently completed and submitted a bid response in the SFS Vendor Portal, and you are interested in viewing the bid response to confirm that it was successfully submitted to the agency.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

SFS Handbook: Grantee Processing in SFS



Step	Action
1.	Click the Grant Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > My Event Activity.  Note: You must log in to the SFS Vendor Portal to view a response to a bid event.



Step	Action
2.	Click the Bid Response Search tile.

SFS Handbook: Grantee Processing in SFS

← | ⌚ | ♥

Q Search in Menu

Event Activity

Welcome [redacted]
User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: 2 Events Bid On: 4 Events Awarded: 0

▼ Search Criteria

Event Format [v]

Event Type [v]

Search

☒ Events Invited To ☐ Events Bid On ☐ Events Awarded

Date Range: From [calendar] Through [calendar]

*Business Unit [Q] Event ID [Q] Event Name []

> Legend

[Return to My Bid Activity](#)

Refresh

Step	Action
3.	The Event Activity page can be used to search for and view: • Events you have been invited to bid on. • Events you have bid on (i.e., submitted a bid response for). • Events you have been awarded funding. In this example, we will search for bid responses that we have submitted over a certain period of time.

SFS Handbook: Grantee Processing in SFS

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Q Search in Menu

Event Activity

Welcome [redacted]
User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: [2](#) Events Bid On: [4](#) Events Awarded: [0](#)

▼ Search Criteria

Event Format

☒ Events Invited To ☐ Events Bid On ☐ Events Awarded

Event Type

Date Range: From Through

*Business Unit Event ID Event Name

> Legend

[Return to My Bid Activity](#)

Step	Action
4.	Notes: - To quickly view the events you have been invited to bid on, select the hyperlinked number next to the Events Invited To field. - To quickly view the events you have bid on, select the hyperlinked number next to the Events Bid On field. - To quickly view the events you have been awarded funding, select the hyperlinked number next to the Events Awarded field.

SFS Handbook: Grantee Processing in SFS

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Q Search in Menu

Event Activity

Welcome,
User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: 2

Events Bid On: 4

Events Awarded: 0

▼ Search Criteria

Event Format

▼

☒ Events Invited To

☐ Events Bid On

☐ Events Awarded

Event Type

▼

Date Range: From Through

Search

*Business Unit

Q

Event ID

Q

Event Name

> Legend

[Return to My Bid Activity](#)

Refresh

Step	Action
5.	The Search Criteria section, below the Event Activity Summary section includes helpful criteria that can be used to further narrow down the list of events your organization has been invited to, bid on, and awarded. In this example, we will use the Search Criteria section to search for bid responses that we have submitted over a certain period of time.

Page 131

SFS Handbook: Grantee Processing in SFS

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Q Search in Menu

Event Activity

Welcome,
User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: 2 Events Bid On: 4 Events Awarded: 0

Search Criteria

Event Format

☐ Events Invited To ☒ Events Bid On ☐ Events Awarded

Event Type

Date Range: From Through

*Business Unit Event ID Event Name

> Legend

[Return to My Bid Activity](#)

Step	Action
6.	To search for a list of bid events we have submitted a bid response for, select the Events Bid On radio button.

SFS Handbook: Grantee Processing in SFS

The screenshot displays the 'Event Activity' interface. At the top, there's a navigation bar with a search menu. Below it, a 'Welcome, User: John Doe' message is visible. The 'Event Activity Summary' section shows statistics: 'Events Invited To: 2', 'Events Bid On: 4', and 'Events Awarded: 0'. The 'Search Criteria' section includes filters for 'Event Format', 'Event Type', 'Date Range' (with 'From' and 'Through' fields), and radio buttons for 'Events Invited To', 'Events Bid On' (selected), and 'Events Awarded'. A 'Search' button is present. A 'Calendar' pop-up is open over the 'From' field, showing the month of May 2024. The date '24' is highlighted. The calendar also shows the days of the week (S, M, T, W, T, F, S) and a 'Current Date' link at the bottom.

Step	Action
7.	To further narrow down our search based on a specific date range, we will use the From and Through fields. Enter the applicable date (format MM/DD/YYYY) in the From field or click the Calendar icon to select the date.

SFS Handbook: Grantee Processing in SFS

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🔍 Search in Menu

Event Activity

Welcome, [Redacted]
User: John Doe

Event Activity Summary
Click on number to view events below
Events Invited To: 2 Events Bid On: 4 Events Awarded: 0

Search Criteria
Event Format [Dropdown] ☐ Events Invited To ☒ Events Bid On ☐ Events Awarded
Event Type [Dropdown] Date Range: From 04/15/2024 [Calendar] Through [Calendar] [Green Box]
[Search] *Business Unit [Search] Event ID [Search] Event Name [Search]

> Legend
[Return to My Bid Activity](#)
[Refresh]

Step	Action
8.	Enter the applicable date (format MM/DD/YYYY) in the Through field or click the Calendar icon to select the date.

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🔍 Search in Menu

Event Activity

Welcome, [Redacted]
User: John Doe

Event Activity Summary
Click on number to view events below
Events Invited To: 2 Events Bid On: 4 Events Awarded: 0

Search Criteria
Event Format [Dropdown] ☐ Events Invited To ☒ Events Bid On ☐ Events Awarded
Event Type [Dropdown] Date Range: From 04/15/2024 [Calendar] Through 04/19/2024 [Calendar]
[Search] *Business Unit [Search] Event ID [Search] Event Name [Search]

> Legend
[Return to My Bid Activity](#)
[Refresh]

SFS Handbook: Grantee Processing in SFS

Step	Action
9.	Additional search criteria can be entered to further narrow down your search results. In this example, we are not going to enter additional search criteria.

The screenshot displays the 'Event Activity' page in the SFS system. At the top, there is a navigation bar with a search icon and a 'Search in Menu' input field. Below the navigation bar, the page title 'Event Activity' is visible. A welcome message 'Welcome, [redacted] User: John Doe' is shown. The 'Event Activity Summary' section includes a link 'Click on number to view events below' and three statistics: 'Events Invited To: 2', 'Events Bid On: 4', and 'Events Awarded: 0'. The 'Search Criteria' section is expanded, showing various filters: 'Event Format' (dropdown), 'Event Type' (dropdown), 'Date Range' (From: 04/15/2024, Through: 04/19/2024), and radio buttons for 'Events Invited To', 'Events Bid On' (selected), and 'Events Awarded'. There are also input fields for '*Business Unit', 'Event ID', and 'Event Name', each with a search icon. A 'Search' button is highlighted with a green border. Below the search criteria, there is a 'Legend' section with a link 'Return to My Bid Activity' and a 'Refresh' button.

Step	Action
10.	Click the Search button.

SFS Handbook: Grantee Processing in SFS

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🔍 Search in Menu

Event Activity

Welcome, ██████████
User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: 2 Events Bid On: 4 Events Awarded: 0

Search Criteria

Event Format

☐ Events Invited To ☒ Events Bid On ☐ Events Awarded

Event Type

Date Range: From 04/15/2024 Through 04/19/2024

Search *Business Unit Event ID Event Name

> Legend

Events

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Event ID	Format	Event Name	Event Status	Start Date	End Date	Status
▶ OMH01-EVT0000001	Self	Outpatient Treatment Programs for Adolescents	Pending Award	04/17/2024 2:01PM EDT	04/26/2024 10:30AM EDT	Accepted
▶ OMH01-EVT0000002	Self	Outpatient Treatment Programs for Adolescents	Pending Award	04/18/2024 9:56AM EDT	04/29/2024 8:15AM EDT	Accepted
▶ OMH01-EVT0000003	Self	Outpatient Treatment Programs for Adolescents	Pending Award	04/19/2024 9:18AM EDT	04/29/2024 9:55AM EDT	Accepted
▶ OMH01-EVT0000004	Self	Outpatient Treatment Programs for Adolescents	Collaborating Bid Analysis	04/19/2024 1:54PM EDT	04/29/2024 8:35AM EDT	Accepted

[Return to My Bid Activity](#)

Step	Action
11.	The list of bid events that we have submitted a response for, within our identified date range, is displayed in the search results.

SFS Handbook: Grantee Processing in SFS

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🔍 Search in Menu

Event Activity

Welcome,
User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: 2Events Bid On: 4Events Awarded: 0

Search Criteria

Event Format

☐ Events Invited To☒ Events Bid On☐ Events Awarded

Event Type

Date Range: From 04/15/2024📅Through 04/19/2024📅

Search

*Business Unit

Event ID

Event Name

> Legend

Events

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Event ID	Format	Event Name	Event Status	Start Date	End Date	Status
▶ OMH01-EVT0000001	Sell	Outpatient Treatment Programs for Adolescents	Pending Award	04/17/2024 2:01PM EDT	04/26/2024 10:30AM EDT	Accepted
▶ OMH01-EVT0000002	Sell	Outpatient Treatment Programs for Adolescents	Pending Award	04/18/2024 9:56AM EDT	04/29/2024 8:15AM EDT	Accepted
▶ OMH01-EVT0000003	Sell	Outpatient Treatment Programs for Adolescents	Pending Award	04/19/2024 9:18AM EDT	04/29/2024 9:55AM EDT	Accepted
▶ OMH01-EVT0000004	Sell	Outpatient Treatment Programs for Adolescents	Collaborating Bid Analysis	04/19/2024 1:54PM EDT	04/29/2024 8:35AM EDT	Accepted

[Return to My Bid Activity](#)

Refresh

Step	Action
12.	Click the Arrow icon next to one of the Event IDs to view additional information regarding the bid response for the specific event.

SFS Handbook: Grantee Processing in SFS

Event Activity

Event Activity Summary

Click on number to view events below

Events Invited To:	2	Events Bid On:	4	Events Awarded:	0
--------------------	---	----------------	---	-----------------	---

Search Criteria

Event Format
 Event Type

☐ Events Invited To
 ☒ Events Bid On
 ☐ Events Awarded

Date Range: From Through

> Legend

Step	Action
13.	Notes: • In the Bid Summary section, a Status of Posted means that the bid response was submitted. • The date and time the bid response was submitted can be found in the Date Time Posted field.

SFS Handbook: Grantee Processing in SFS

Event Activity

Event Activity Summary

Click on number to view events below

Events Invited To:	2	Events Bid On:	4	Events Awarded:	0
--------------------	---	----------------	---	-----------------	---

Search Criteria

Event Format
 Event Type

☐ Events Invited To
 ☒ Events Bid On
 ☐ Events Awarded

Date Range: From Through

*Business Unit
Event ID
Event Name

> Legend

Step	Action
14.	To view the response that was provided to the bid, click the View Details icon.

SFS Handbook: Grantee Processing in SFS

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Q Search in Menu

Event Activity

Welcome, [User]
 User: John Doe

! Event Completed. You are not allowed to enter a bid after events completion.
 ! Bid Posted. No more changes allowed
 ! You are authorized to view this event Only. Status: Pending Award

Event Name		Outpatient Treatment Programs for Adolescents		Bidding Instructions	Bid Response PDF
Event ID	OMH01-EVT0000001			Bid ID	1
Event Format/Type	Sell Event	RFX	Additional Bid Info		
Event Round	1				
Event Version	1				
Event Start Date	04/17/2024 2:01PM EDT				
Event End Date	Pending Award				
Processing Status	Awarded				
		Anticipated Contract Date			

[Hide Additional Event Info](#)

Description:

The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of for individuals less than 18 years old.

New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18 . Approximately \$1,000,000 each is available for three programs.

All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact DOE, JOHN Phone Email test123@sfs.ny.gov Online Discussion	Payment Terms Billing Location Office of Mental Health Event Currency Dollar Conversion Rate 1.00000000 Edits to Submitted Bids Not Allowed Multiple Bids Allowed
--	--

Step	Action
15.	Upon clicking the View Details icon, you may receive a message advising you to review the message(s) at the top of the page. Click the OK button.

SFS Handbook: Grantee Processing in SFS

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🔍 Search in Menu

Event Activity

Welcome,
User: John Doe

! Event Completed. You are not allowed to enter a bid after events completion.
! Bid Posted. No more changes allowed.
! You are authorized to view this event Only. Status: Pending Award

Submit Bid

Save for Later

Cancel

Validate Entries

Event Name

Outpatient Treatment Programs for Adolescents

Bidding Instructions

Bid Response PDF

Event ID

OMH01-EVT0000001

Additional Bid Info

Event Format/Type

Sell Event

Rfx

Event Round

1

Event Version

1

Event Start Date

04/17/2024 2:01PM EDT

Event End Date

Pending Award

Processing Status

Awarded

Bid ID

1

Bid Date

04/18/2024 9:48:29AM EDT

Bid Currency

USD

US Dollar

Estimated Award Date

Anticipated Contract Date

Hide Additional Event Info

Description:

The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of for individuals less than 18 years old.

New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18 . Approximately \$1,000,000 each is available for three programs.

All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact

DOE, JOHN

Phone

Email

test123@sfs.ny.gov

Online Discussion

Payment Terms

Billing Location

Office of Mental Health

Event Currency

Dollar

Conversion Rate

1.00000000

Edits to Submitted Bids

Not Allowed

Multiple Bids

Allowed

Step	Action
16.	In this example, the messages at the top of the page indicate that: • Event Completed: This means that the Event End Date has passed, and applications can no longer be submitted. • Bid Posted: This means that your bid response has been submitted to the agency for review. • You are authorized to view this event only: This means that changes can no longer be made to your bid response.

SFS Handbook: Grantee Processing in SFS

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🔍 Search in Menu

Event Activity

Welcome,
User: John Doe

! Event Completed. You are not allowed to enter a bid after events completion.
! Bid Posted. No more changes allowed.
! You are authorized to view this event Only. Status: Pending Award

Submit Bid

Save for Later

Cancel

Validate Entries

Event Name

Outpatient Treatment Programs for Adolescents

Bidding Instructions

Bid Response PDF

Event ID

OMH01-EVT0000001

Additional Bid Info

Bid ID

1

Event Format/Type

Sell Event

RFX

Bid Date

04/18/2024 9:48:29AM EDT

Event Round

1

Bid Currency

USD

US Dollar

Event Version

1

Estimated Award Date

Event Start Date

04/17/2024 2:01PM EDT

Anticipated Contract Date

Event End Date

Pending Award

Processing Status

Awarded

Hide Additional Event Info

Description:

The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of for individuals less than 18 years old.

New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18 . Approximately \$1,000,000 each is available for three programs.

All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact

DOE, JOHN

Payment Terms

Phone

Billing Location

Office of Mental Health

Email

test123@sfs.ny.gov

Event Currency

Dollar

Online Discussion

Conversion Rate

1.00000000

Edits to Submitted Bids

Not Allowed

Multiple Bids

Allowed

Step	Action
17.	You can select the Bid Response PDF link to view the responses to the bid in a PDF format or use the scrollbar to scroll down and view the responses that were entered for this bid.

SFS Handbook: Grantee Processing in SFS

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Event Details

Response

We serve a wide variety of individuals with various characteristics and needs. Below are some of the current characteristics of population to be served: Youth aging out of foster care, Youth aging out of long-term residential treatment facilities, and adolescents who are homeless or

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event	1
Lines Responded To	1
Your Total Line Pricing	10,000.0000 USD

[Hide Line Detail](#)

★ Bid Required 🗨️ Line Comments/Files

Lines

<< < 1-1 of 1 > >> | View All

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price	
1	Period Details -1		Line 1	EA	10000.000000	10,000.0000 USD	🗨️

[Event Comments and Attachments](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

Submit Bid

Save for Later

Validate Entries

[Return to Bidder Activity](#)

Step	Action
18.	To return to the Event Activity page, click the Return to Bidder Activity link at the bottom of the page.

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Event Activity' section of the SFS Vendor Portal. At the top, there is a navigation bar with a search icon and a 'Search in Menu' button. Below this, the 'Event Activity Summary' section displays a welcome message for 'John Doe' and a summary of event statistics: 'Events Invited To: 2', 'Events Bid On: 4', and 'Events Awarded: 0'. A 'Search Criteria' section follows, featuring dropdown menus for 'Event Format' and 'Event Type', radio buttons for 'Events Invited To' (selected), 'Events Bid On', and 'Events Awarded', and a 'Date Range' section with 'From' and 'Through' date pickers. Below these are input fields for '*Business Unit', 'Event ID', and 'Event Name', each with a search icon. A 'Search' button is also present. At the bottom of the search criteria section, there is a '> Legend' link and a 'Refresh' button.

Step	Action
19.	You have successfully completed the View Submitted Bid Responses topic.

Cancel Submitted Bid Responses Before Bid Event has Ended

Topic Description:

This topic provides the knowledge and skills to cancel a submitted bid response before a bid event has ended.

Topic Objectives:

In this topic, you will learn:

- How to cancel a submitted bid response before a bid event has ended.

SFS role(s) required to perform this task:

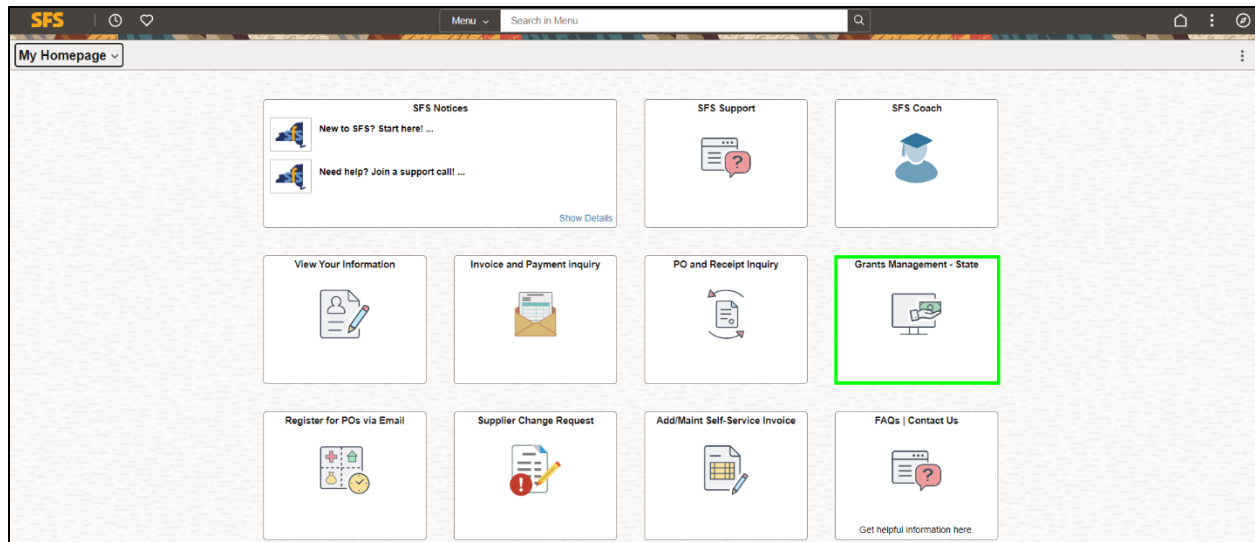
- Bid Response Submitter (NY_GM_VENDOR_EVENT_SUBMIT)
 - **Note:** This role allows you to initiate, submit, and cancel a bid response to the agency.

Procedure

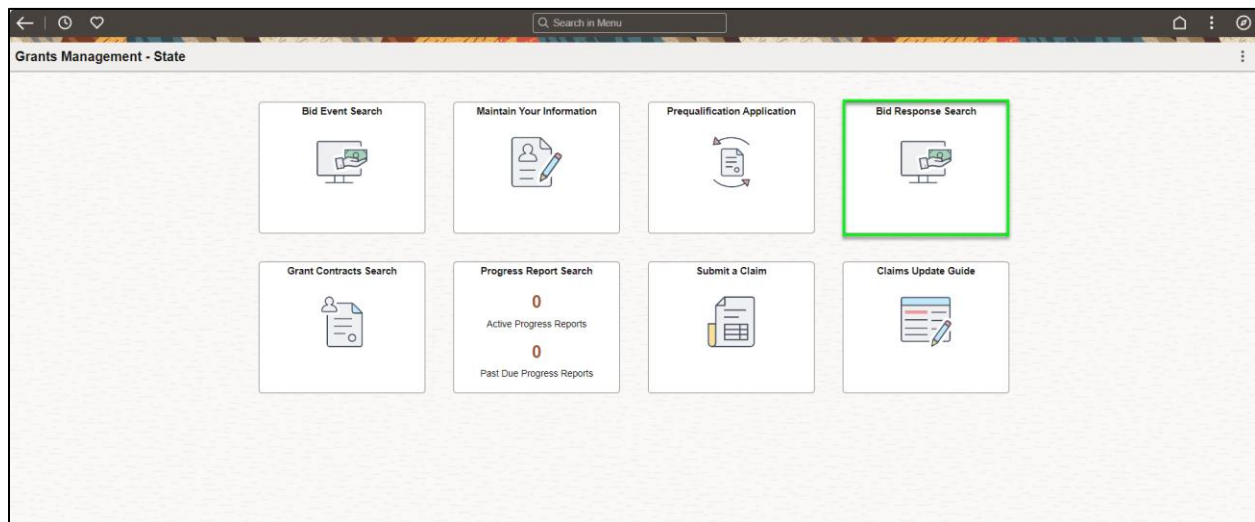
Scenario: You have recently completed and submitted a bid response in the SFS Vendor Portal but realize the bid response is incorrect and needs to be canceled. The bid event is currently available and has not ended.

SFS Handbook: Grantee Processing in SFS

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



Step	Action
1.	Click the Grant Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > My Event Activity.  Note: You must log in to the SFS Vendor Portal to view a response to a bid event.



SFS Handbook: Grantee Processing in SFS

Step	Action
2.	Click the Bid Response Search tile.

The screenshot displays the 'Event Activity' page. At the top, there's a navigation bar with a search menu. Below it, a header section shows 'Event Activity' and a welcome message for 'John Doe'. The main content area features an 'Event Activity Summary' section with a table showing 'Events Invited To: 2', 'Events Bid On: 4', and 'Events Awarded: 0'. Below this is a 'Search Criteria' section with various filters: 'Event Format' (dropdown), 'Event Type' (dropdown), 'Date Range' (From/Through dates), and 'Event Name' (text input). There are also radio buttons for 'Events Invited To', 'Events Bid On', and 'Events Awarded'. A 'Search' button is present. At the bottom, there's a 'Legend' section and a 'Refresh' button.

Step	Action
3.	The Event Activity page can be used to search for and view: • Events you have been invited to bid on. • Events you have bid on (i.e., submitted a bid response for). • Events you have been awarded funding. In this example, we will search for bid responses that we have submitted over a certain period of time.

SFS Handbook: Grantee Processing in SFS

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Q Search in Menu

Event Activity

Welcome [redacted]
User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: [2](#) Events Bid On: [4](#) Events Awarded: [0](#)

▼ Search Criteria

Event Format

☒ Events Invited To ☐ Events Bid On ☐ Events Awarded

Event Type

Date Range: From Through

*Business Unit Event ID Event Name

> Legend

[Return to My Bid Activity](#)

Step	Action
4.	Notes: - To quickly view the events you have been invited to bid on, select the hyperlinked number next to the Events Invited To field. - To quickly view the events you have bid on, select the hyperlinked number next to the Events Bid On field. - To quickly view the events you have been awarded funding, select the hyperlinked number next to the Events Awarded field.

SFS Handbook: Grantee Processing in SFS

Search in Menu

Event Activity

Welcome,
User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: 2

Events Bid On: 4

Events Awarded: 0

Search Criteria

Event Format

Event Type

Search

Events Invited To

Events Bid On

Events Awarded

Date Range:

From

Through

*Business Unit

Event ID

Event Name

> Legend

[Return to My Bid Activity](#)

Refresh

Step	Action
5.	The Search Criteria section, below the Event Activity Summary section includes helpful criteria that can be used to further narrow down the list of events your organization has been invited to, bid on, and awarded. In this example, we will use the Search Criteria section to search for bid responses that we have submitted over a certain period of time.

SFS Handbook: Grantee Processing in SFS

Q Search in Menu

Event Activity

Welcome,
User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: 2Events Bid On: 4Events Awarded: 0

Search Criteria

Event Format

☐ Events Invited To☒ Events Bid On☐ Events Awarded

Event Type

Date Range: FromThrough

Search

*Business Unit

Event ID

Event Name

> Legend

[Return to My Bid Activity](#)

Refresh

Step	Action
6.	To search for a list of bid events we have submitted a bid response for, select the Events Bid On radio button.

SFS Handbook: Grantee Processing in SFS

Event Activity

Supplier ID

Welcome,
User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: 0

Events Bid On: 3

Events Awarded: 0

Search Criteria

Event Format

Events Invited To

Events Bid On

Events Awarded

Event Type

Date Range:

From

Through

Search

*Business Unit

Q

Event ID

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Event f

> Legend

Return to My Bid Activity

Refresh

Calendar

November

2025

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Current Date

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Step	Action
7.	To further narrow down our search based on a specific date range, we will use the From and Through fields. Enter the applicable date (format MM/DD/YYYY) in the From field or click the Calendar icon to select the date.

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Event Activity' page in the SFS system. At the top, there is a navigation bar with a search menu. Below the header, a welcome message for 'John Doe' is displayed. The 'Event Activity Summary' section shows counts for 'Events Invited To' (2), 'Events Bid On' (4), and 'Events Awarded' (0). The 'Search Criteria' section is expanded, showing filters for 'Event Format', 'Event Type', 'Date Range' (From 11/03/2025, Through [empty]), and 'Events Invited To', 'Events Bid On', and 'Events Awarded'. A 'Search' button is present. Below the search criteria, there is a 'Legend' section and a 'Return to My Bid Activity' link. A 'Refresh' button is at the bottom.

Step	Action
8.	Enter the applicable date (format MM/DD/YYYY) in the Through field or click the Calendar icon to select the date.

This screenshot shows the same 'Event Activity' page as the previous one, but with the 'Through' date field in the 'Date Range' section populated with '11/04/2025'. The 'From' date remains '11/03/2025'. The 'Search' button and other elements are the same.

SFS Handbook: Grantee Processing in SFS

Step	Action
9.	Additional search criteria can be entered to further narrow down your search results. In this example, we are not going to enter additional search criteria.

The screenshot displays the 'Event Activity' interface. At the top, there is a navigation bar with a search icon and a 'Search in Menu' input field. Below this, the 'Event Activity Summary' section shows statistics: 'Events Invited To: 2', 'Events Bid On: 4', and 'Events Awarded: 0'. The 'Search Criteria' section is expanded, showing filters for 'Event Format', 'Event Type', 'Date Range' (From 11/03/2025 to 11/04/2025), and 'Business Unit'. A green box highlights the 'Search' button. Below the search criteria, there is a 'Legend' section and a 'Return to My Bid Activity' link. A 'Refresh' button is located at the bottom left.

Step	Action
10.	Click the Search button.

SFS Handbook: Grantee Processing in SFS

Event Activity

Supplier ID
Welcome,
User: John Doe

Event Activity Summary
Click on number to view events below
Events Invited To: 0 Events Bid On: 1 Events Awarded: 0

Search Criteria
Event Format ☐ Events Invited To ☒ Events Bid On ☐ Events Awarded
Event Type Date Range: From 11/03/2025 Through 11/04/2025
 *Business Unit Event ID Event Name

Legend

Events | < > 1 of 1

Event ID	Format	Event Name	Event Status	Start Date	End Date	Status
OMH01-EVT0000006	Sell	110425 GRANTS TESTING	Posted	11/04/2025 10:07AM PST	11/30/2025 10:07AM PST	Accepted

[Return to My Bid Activity](#)

Step	Action
11.	Click the applicable Event ID link from the search results where the Bid Event has not ended.

SFS Handbook: Grantee Processing in SFS

Event Details	
Supplier ID Welcome, User: John Doe	
Information On Inquiry Options Bid on Event	Bidding Shortcuts: View Event Activity View Event Package Upload XML Bid Response View, Edit or Copy from Saved Bids
Event Name 110425 GRANTS TESTING Event ID OMH01-EVT0000006 Event Format/Type Sell Event RFX Event Round 1 Event Version 1 Event Start Date 11/04/2025 1:07PM EST Event End Date 11/30/2025 1:07PM EST	
Event Description: GRANTS TESTING - MISSING ATTACHMENT VALIDATIONS 	
Contact Doe, Jane Phone 518/474-2581 Email test123@sfs.ny.gov Online Discussion Live Chat Help	Payment Terms My Bids 1 In-Process Edits to Submitted Bids Not Allowed Multiple Bids Allowed

Step	Action
12.	Click the In-Process link located to the right of the My Bids field.

SFS Handbook: Grantee Processing in SFS

View, Edit or copy from Saved Bids

Supplier ID 

Welcome,
User: John Doe

Event Name110425 GRANTS TESTING

Event IDOMH01-EVT0000006

Event Format/TypeSell Event RFx

Event Start Date11/04/2025 1:07PM EST

Event End Date11/30/2025 1:07PM EST

Event Round1

Event Version1

Multiple BidsAllowed

Currency:US Dollar

Bids



< > 1-1 of 1 >

Bid ID	Round	Version	Bid Status	Event Status	Bid Last Saved				
1	1	1	Saved	Posted	11/04/2025 1:32PM EST	View/Edit	Copy	Cancel	Upload

[Return to Event Search](#)

Step	Action
13.	Click the Cancel link.
14.	You will receive a message asking you if you would like to proceed with the cancellation. Click Yes to proceed with the cancellation. Note: If you do not want to proceed with the cancellation, click No .
15.	You have successfully completed the Cancel Submitted Bid Responses Before Bid Event has Ended topic.

Reviewing and Approving Grant Contracts

Lesson Description:

This lesson provides the knowledge and skills to review and approve grant contracts. This lesson also provides information on how to complete and submit progress reports for approval.

Progress reporting is a tool that measures the progress of the grant contract over its lifetime in SFS.

Lesson Objectives:

In this lesson, you will learn how to:

- Preview a Contract Agreement
- Review and Update Budget and Work Plan Information on a Contract
- Approve Contract Collaboration
- Apply Electronic Signature on a Contract Agreement
- Complete Performance Measures for a Progress Report and Submit a Progress Report for Agency Review
- Update and Re-submit a Returned Progress Report

SFS Handbook: Grantee Processing in SFS

Preview a Contract Agreement

Topic Description:

This topic provides the knowledge and skills to review a Contract Agreement.

Topic Objectives:

In this topic, you will learn:

- How to review a Contract Agreement

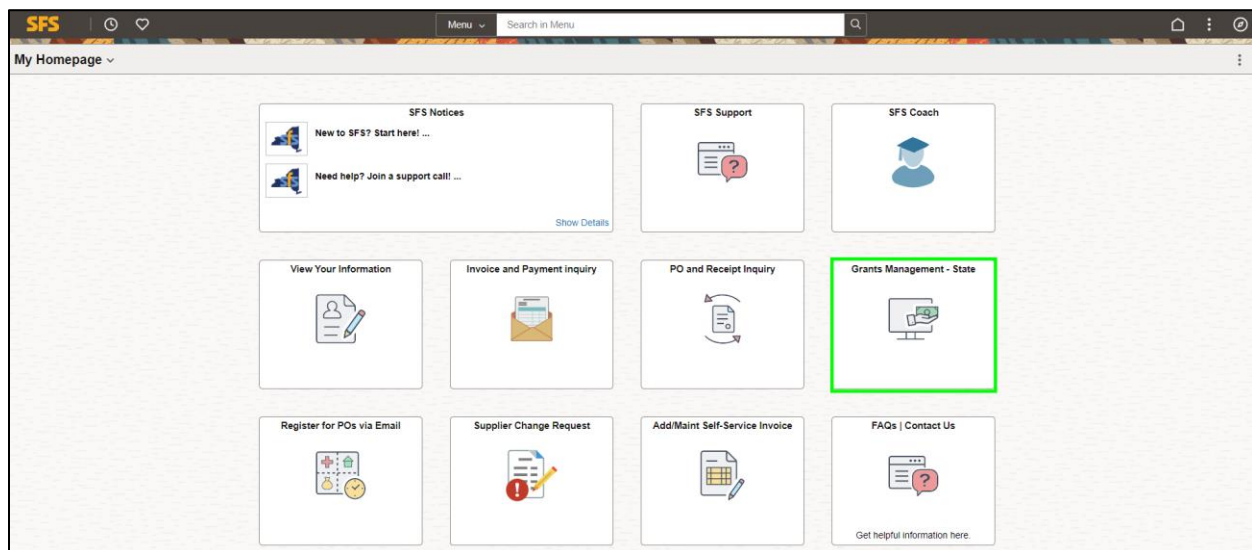
SFS role required to perform this task:

- Grants Contract Collaborator (NY_ES_SUPPLIER_CONTRACT_COLLAB)

Procedure

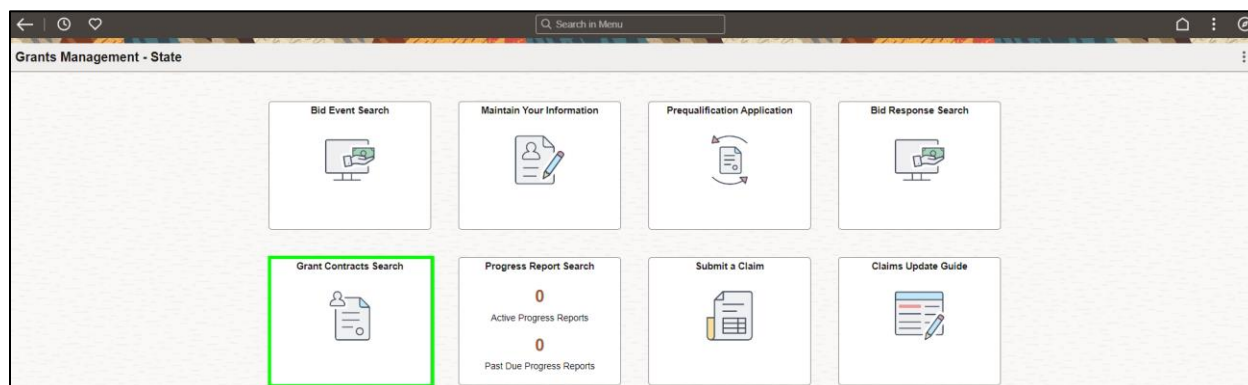
Scenario: You have been awarded a grant contract and would like to preview the grant contract before you take action on it. You will navigate to the Maintain Contract Documents page and click the View Document button.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

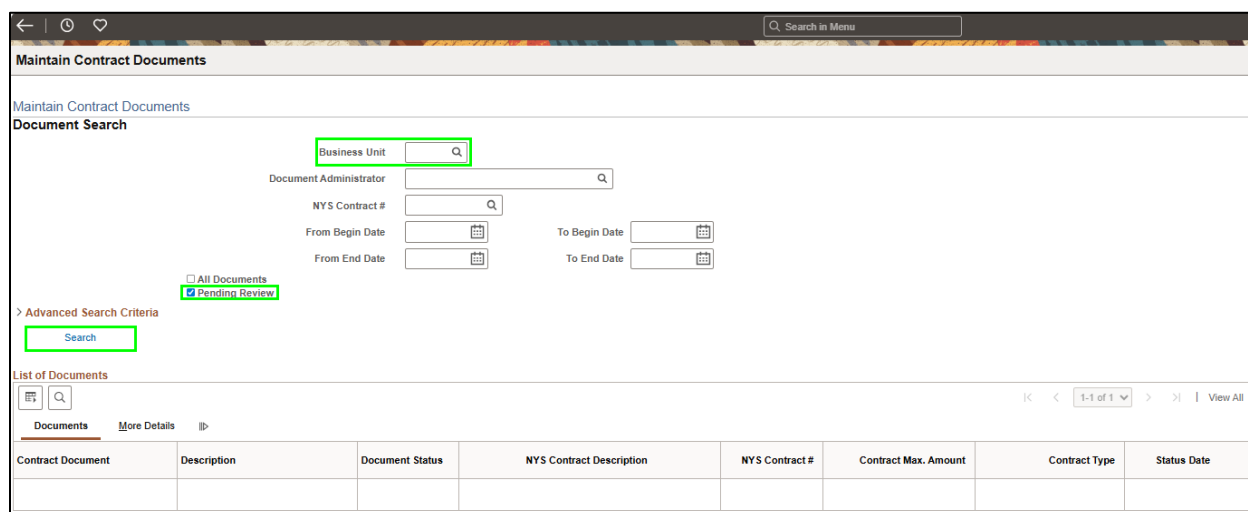


SFS Handbook: Grantee Processing in SFS

Step	Action
1.	Preferred Navigation: Click the Grant Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Maintain Contract Documents Note: You must log in to the SFS Vendor Portal to view a grant contract.



Step	Action
2.	Click the Grant Contracts Search tile.



SFS Handbook: Grantee Processing in SFS

Step	Action
3.	Enter the agency's business unit into the Business Unit field or click the magnifying glass to search for the information. If you are unsure of the business unit for the State Agency you are doing business with, click the magnifying glass to view a list of business units and state agencies.  Note: If you do not know any criteria, you can leave the search criteria in the Document Search section blank.
4.	Verify the Pending Review checkbox is selected. Note: To view grant contracts that are pending review and grant contracts that have previously been approved, verify the All Documents checkbox is selected.
5.	Click the Search button.

[illegible]

Step	Action
6.	Click the applicable Contract ID from the search results. If your organization has more than ten contract results, use the View All button to show all results on one page.

SFS Handbook: Grantee Processing in SFS

Documents

Document Administrator
 Approval Start Date: 04/23/2024 12:51PM
 Begin Date: 01/01/2024
 Expire Date: 12/31/2024
 Document Status: Pending Review
 Owner

Information Available for Review

	Period Start Date	Period End Date	Period Amount	Budget Detail Period	Budget Detail Status	Budget Detail Review Date	Budget Period Mark as Reviewed	Work Plan Period	Workplan Detail Status	Work Plan Review Date	Workplan Period Mark as Reviewed
1	01/01/2024	12/31/2024	22,000,000	Period 1	New		☐	Period 1	New		☐

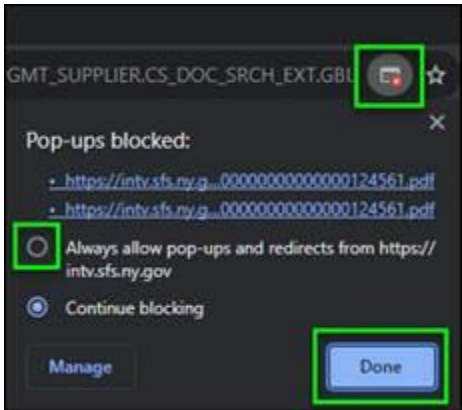
Comments History

Comments

Approve Deny Pushback

View Document

Add Additional Attachments
 Send E-Mail
 View Executed Documents

Step	Action
7.	Click the View Document button to review the Contract Agreement document.
Step	Action
8.	Note: If you do not see this popup, it may be blocked by your browser. Please click the blocked popup icon in the address bar, select the option to “Always allow pop-ups and redirects from https://esupplier.sfs.ny.gov/psp/fscm/SUPPLIER/?cmd=login” and click the Done button. Following this, click the View Document button again to view the new browser window. 

SFS Handbook: Grantee Processing in SFS

STATE OF NEW YORK MASTER CONTRACT FOR GRANTS FACE PAGE

STATE AGENCY (Name & Address): Office of Mental Health 44 Holland Avenue Albany, NY 12229	BUSINESS UNIT/DEPT ID: OMH01 1100206 CONTRACT NUMBER: OMH01-00124GM-1100206 CONTRACT TYPE:
CONTRACTOR NAME: STAPLES INC	TRANSACTION TYPE: New
	PROJECT NAME:
CONTRACTOR IDENTIFICATION NUMBERS: NYS Vendor ID Number: 1000053985 Federal Tax ID Number:	CFDA NUMBER (Federally Funded Grants Only):
CONTRACTOR PRIMARY MAILING ADDRESS: PO BOX 415256 DEPT ROC BOSTON, MA 02241-5256 CONTRACTOR PAYMENT ADDRESS: ☒ Check if same as primary mailing address CONTRACTOR MAILING ADDRESS: ☒ Check if same as primary mailing address	CONTRACTOR STATUS: ☐ For Profit ☐ Municipality ☐ Tribal Nation ☐ Individual ☐ Not-For- Profit Charities Registration Number: Exemption Status/Code: ☐ Sectarian Entity

Step	Action
9.	When you are finished reviewing the Contract Agreement document, click the Close (X) button. 
10.	You have successfully completed the Preview Contract Agreement topic.

Update Contract Period Budget and Work Plan Information and Complete Review of a Contract during Collaboration

Topic Description:

This topic provides the knowledge and skills to review and update budget and work plan information on a contract. This topic also shows how to complete the review of a contract during the collaboration phase. After grantee collaboration is complete, the contract will route back to the agency to complete the collaboration stage. Once the collaboration stage is complete, the contract will route to the grantee for signature.

Topic Objectives:

SFS Handbook: Grantee Processing in SFS

In this topic, you will learn:

- How to review and update the budget and work plan information on a contract
- How to complete review of a contract during collaboration

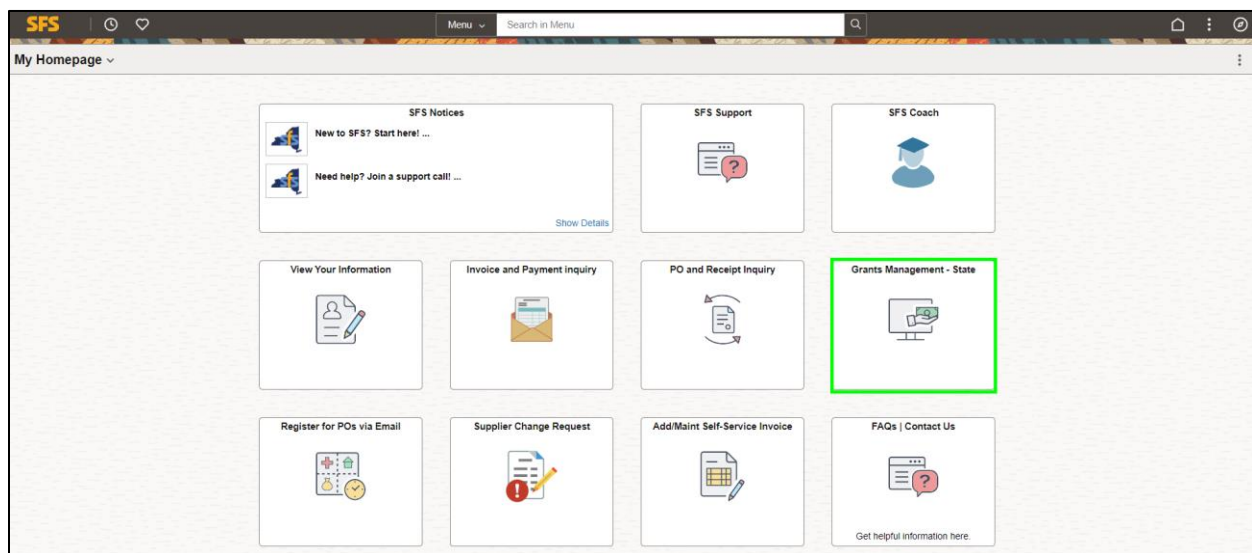
SFS role(s) required to perform this task:

- Grants Contracts Editor (NY_ES_VNDR_CNTRCT_CHANGE)
 - **Note:** This role allows you to make changes to a grant contract budget and work plan.
- Grants Contract Collaborator (NY_ES_SUPPLIER_CONTRACT_COLLAB)
 - **Note:** This role allows you to review and collaborate on a grant contract with the agency.

Procedure

Scenario: You have reviewed a Contract Agreement and determined that the budget and work plan information need to be updated. After updating the budget and work plan information, you will indicate your review is complete for the contract.

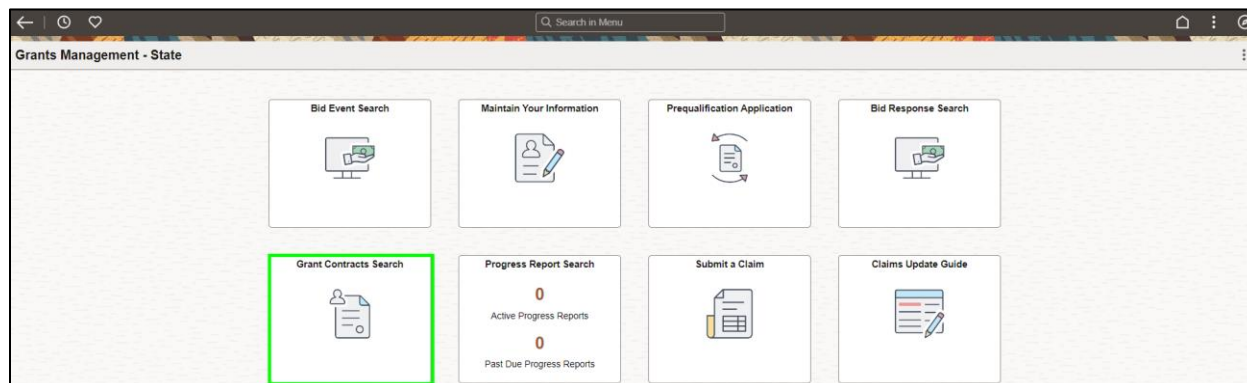
Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



Step	Action
1.	Preferred Navigation: Click the Grant Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Maintain Contract Documents

SFS Handbook: Grantee Processing in SFS

Step	Action
	Note: You must log in to the SFS Vendor Portal to update grant contract information.



Step	Action
2.	Click the Grant Contracts Search tile.

The screenshot shows the 'Maintain Contract Documents' page. Under the 'Document Search' section, the 'Business Unit' field is highlighted with a green box. Below it, the 'Document Administrator' field is visible. Further down, the 'Pending Review' checkbox is checked and highlighted with a green box. The 'Search' button is also highlighted with a green box. The 'Advanced Search Criteria' section is expanded, showing a list of documents.

Step	Action
3.	Enter the agency's business unit into the Business Unit field or click the magnifying glass to search for the information. If you are unsure of the business unit for the State Agency you are doing business with, click the magnifying glass to view a list of business units and state agencies. 
4.	Verify the Pending Review checkbox is selected.

SFS Handbook: Grantee Processing in SFS

5.	Click the Search button.
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[illegible]

Step	Action
6.	Click the applicable Contract ID link from the search results under the Contract Document column. If your organization has more than ten contract results, use the View All button to show all results on one page. Note: If your organization has multiple people assigned to the Grants Contract Collaborator role, please work within your organization to determine who is responsible for collaborating on each grant contract, as only one person can approve a specific grant contract during collaboration in SFS.

Documents

Document Administrator
Approval Start Date: 04/23/2024 12:51PM
Begin Date: 01/01/2024
Expire Date: 12/31/2024
Document Status: Pending Review
Owner:

Information Available for Review

Period Start Date	Period End Date	Period Amount	Budget Detail Period	Budget Detail Status	Budget Detail Review Date	Budget Period Mark as Reviewed	Work Plan Period	Workplan Detail Status	Work Plan Review Date	Workplan Period Mark as Reviewed
1 01/01/2024	12/31/2024	22,000.000	Period 1	New		☐	Period 1	New		☐

Comments History

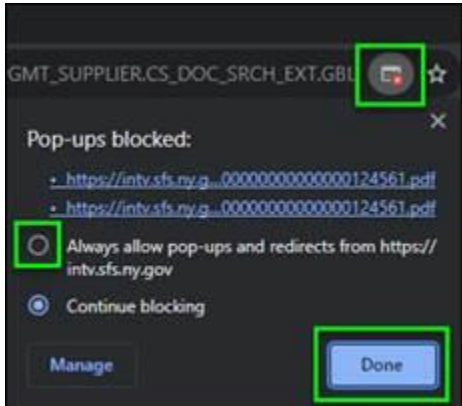
Comments

Approve Deny Pushback

View Document

Add Additional Attachments
Send E-Mail
View Executed Documents

SFS Handbook: Grantee Processing in SFS

Step	Action
7.	Click the View Document button to review the Contract Agreement document if you want to view this information. You may need to scroll to see this button. Note: This is an optional step.
8.	Note: If you do not see this popup, it may be blocked by your browser. Please click the blocked popup icon in the address bar, select the option to “Always allow pop-ups and redirects from https://esupplier.sfs.ny.gov/psp/fscm/SUPPLIER/?cmd=login” and click the Done button. Following this, click the View Document button again to view the new browser window. 

SFS Handbook: Grantee Processing in SFS

STATE OF NEW YORK MASTER CONTRACT FOR GRANTS FACE PAGE

STATE AGENCY (Name & Address): Office of Mental Health 44 Holland Avenue Albany, NY 12229	BUSINESS UNIT/DEPT ID: OMH01 1100206 CONTRACT NUMBER: OMH01-00124GM-1100206 CONTRACT TYPE:
CONTRACTOR NAME: STAPLES INC	TRANSACTION TYPE: New
CONTRACTOR IDENTIFICATION NUMBERS: NYS Vendor ID Number: 1000053985 Federal Tax ID Number:	PROJECT NAME:
CONTRACTOR PRIMARY MAILING ADDRESS: PO BOX 415256 DEPT ROC BOSTON, MA 02241-5256 CONTRACTOR PAYMENT ADDRESS: ☒ Check if same as primary mailing address CONTRACTOR MAILING ADDRESS: ☒ Check if same as primary mailing address	CONTRACTOR STATUS: ☐ For Profit ☐ Municipality ☐ Tribal Nation ☐ Individual ☐ Not-For-Profit Charities Registration Number: Exemption Status/Code: ☐ Sectarian Entity

Step	Action
9.	When you are finished reviewing the Contract Agreement document, click the Close (X) button.

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Contract ID

00000000000000000000141465

Description

OMH01-C00073GM-3650000

Document Administrator

Approval Start Date

04/23/2024 12:51PM

Begin Date

01/01/2024

Expire Date

12/31/2024

Document Status

Pending Review

Owner

Information Available for Review ⓘ

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1-1 of 1 ▾

	Period Start Date	Period End Date	Period Amount	Budget Detail Period	Budget Detail Status	Budget Detail Review Date	Budget Period Mark as Reviewed	Work Plan Period	Workplan Detail Status	Work Plan Review Date	Workplan Period Mark as Reviewed
1	01/01/2024	12/31/2024	22,000,000	Period 1	New		☐	Period 1	New		☐

Comments History

Comments

Approve

Deny

Pushback

View Document

Add Additional Attachments

Send E-Mail

View Executed Documents

Step	Action
10.	Review comments in the Comments History field for any specific instructions from the agency prior to navigating to the budget/work plan pages.
11.	Click the applicable Period link under the Budget Detail Period heading to review and edit the budget period detail information.

Contract Period Budget

Help

Available for Supplier Updates ⓘ

Contract SetID: SHARE

Contract ID: 00000000000000000000141465

Version #: 1

Budget Type: EXPENDITURE

Copy from Contract Period

Contract Period: 1

Period From Date: 01/01/2024

Period To Date: 12/31/2024

Period Amount 22,000.00

Budget Properties

Apply Match: Not Allowed ⓘ

Calculate Match: ⓘ

Include Match Worksheet

Allow Supplier to Add Deliverable/Outcome Rows ⓘ

Use Match

Match % 0.00

Budget Category Properties

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1-10 of 10 ▾

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View All

	Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage
1	SALARY	☒	☐	0	☐	☐	
2	FRINGE	☒	☐	0	☐	☐	

SFS Handbook: Grantee Processing in SFS

Step	Action
12.	Note: When the Available for Supplier Updates option is selected, the grantee can update the budget information. When de-selected, the grantee can only view the budget information.
13.	Review Budget Category Property section (including Narrative), noting which rows have Available in Grant checked. Note: Grantees will only be able to update the budget categories that have Available in Grant selected. Grantees will need to scroll down to the Period Budget Summary section to make updates to the available budget categories.

Contract Period Budget

Period Budget Summary

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1-10 of 10

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View All

	Budget Category	Grant Funds Requested	Match Funds	Match Funds Calculated	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SALARY								
2	FRINGE								
3	CONTRACTUAL								
4	TRAVEL								
5	EQUIPMENT								
6	SPACE/PROPERTY RENT								
7	SPACE/PROPERTY OWN								
8	UTILITIES								
9	OPERATING EXPENSES								
10	OTHER								

Total Grant Funds Requested

0.00

Total Match Funds Calculated

0.00

Total Match Funds

0.00

Total Other Funds

0.00

Grand Total

0.00

OK

Cancel

Apply

Step	Action
14.	Click the Category Details icon, located at the bottom of the page, associated to the budget category to update the budget category detail information. You may need to scroll to see these icons. Note: The Category Detail fields will vary based on the Budget Category.

SFS Handbook: Grantee Processing in SFS

Category Details

Contract ID

00000000000000000000141465

Budget Type

EXPENDITURE

Budget Category

FRINGE

Contract Version

1

Contract Period

1

Match % Required

Match Worksheet

Category Details

1-1 of 1

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View All

	Type/Description	Grant Funds	Match Funds	Match %	Other Funds	Total Funds		
1							+	-
Total Grant Funds		0.00						
Total Match Funds		0.00						
Total Other Funds		0.00						
Category Details Totals		0.00						

Narrative

OK

Cancel

Step	Action
15.	In this example, we are updating budget category detail information for the Fringe budget category and Expenditure budget type.
16.	Make the applicable updates to the budget category detail information. In this example, we are increasing the Grant Funds amount for the Fringe budget category, so the total grant funds requested for all the budget categories equals the period amount.
17.	The Narrative field should be used to provide additional details about the information entered for a specific budget category. In this example, we will enter Increased the grant funds amount so total grant funds requested equals the period amount in the Narrative field.
18.	Note: - The above fields are only available when the Agency who collaborated on the contract has indicated that they are applicable for the contract. If this is not the case, these fields will be greyed out. - The Total Funds will automatically calculate based on the sum of the Grant Funds, Match Funds, and Other Funds.
19.	When you are finished entering the Budget Category Detail information, click the OK button.

SFS Handbook: Grantee Processing in SFS

Contract Period Budget

▼ Period Budget Summary

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1-10 of 10

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>|
View All

	Budget Category	Grant Funds Requested	Match Funds	Match Funds Calculated	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SALARY								
2	FRINGE	22,000.00						22,000.00	
3	CONTRACTUAL								
4	TRAVEL								
5	EQUIPMENT								
6	SPACE/PROPERTY RENT								
7	SPACE/PROPERTY OWN								
8	UTILITIES								
9	OPERATING EXPENSES								
10	OTHER								

Total Match Funds Calculated 0.00

Total Grant Funds Requested 22,000.00

Total Match Funds 0.00

Total Other Funds 0.00

Grand Total 22,000.00

OK
Cancel
Apply

Step	Action
20.	Click the Apply button to save your changes.
21.	Click the OK button to return to the Document Management page.

Documents

Contract ID
Description
Document Administrator
Approval Start Date
Begin Date
Expire Date
Document Status
Owner

00000000000000000141465
OMH01-C00073GM-3650000

04/23/2024 12:51PM
01/01/2024
12/31/2024
Pending Review
Owner

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Information Available for Review ⓘ

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	Period Start Date	Period End Date	Period Amount	Budget Detail Period	Budget Detail Status	Budget Detail Review Date	Budget Period Mark as Reviewed	Work Plan Period	Workplan Detail Status	Work Plan Review Date	Workplan Period Mark as Reviewed
1	01/01/2024	12/31/2024	22,000.000	Period 1	In Process		☐	Period 1	New		☐

Comments History ⓘ

Comments

Approve

Deny

Pushback

SFS Handbook: Grantee Processing in SFS

Step	Action
22.	Click the applicable Period link under the Work Plan Period heading to review and edit the work plan information.

[illegible]

Step	Action
23.	Note: When the Available for Supplier Updates option is selected, the vendor can update the work plan information. When de-selected, the vendor can only view the work plan information.
24.	The Work Plan contains the following three elements: • Objectives: Each work plan can have one to many objectives established by the agency and/or the vendor. • Tasks: Each objective can have one to many tasks established by the agency and/or the vendor. • Performance Measures: Each task can have one to many performance measures established by the agency and/or the vendor. Performance measures are required when utilizing online work plan based reports in SFS. Note: • An Agency can leave Name and Description fields blank for Objectives, Tasks, and Performance Measures to allow the Vendor to input. The

SFS Handbook: Grantee Processing in SFS

Step	Action
	Vendor can update blank Name and Description fields on Agency entered rows when the Available for Supplier Updates is checked. The Name and Description on all the Objectives, Tasks and Performance Measure rows must be populated prior to the last step in the Collaboration Workflow Stage before the user can submit the contract into the Approval Workflow Stage.
25.	For each Objective enter a Name and a Description. Note: A message will display when the Name or Description fields are left blank on any rows. If Name is entered a corresponding Description should be entered. If Description is entered, a value in the corresponding Name field should be entered.
26.	If the Allow Supplier Defined Objectives & Tasks box located at the top of the page is checked and the Maximum Number of Objectives, Tasks, and Performance Measures have not already been entered, then you can add new objective, tasks, and performance measures if needed. Select the checkbox for the Objective, Task, and/or Performance Measure where the new objective, task, and/or performance measure will be inserted and then select the + Objective button to add a new objective. Select the + Task button to add a new task and select the + Perf Measure button to add a new performance measure. An objective must be inserted before a task can be inserted and a task must be inserted before a performance measure can be inserted. Note: The default for the Maximum Number of Objectives that can be added to a work plan for a period is 50. This number must be 50 or less. The default for the Maximum Number of Tasks that can be added to a work plan for a period is 100. This number must be 100 or less. The default for the Maximum Number of Performance Measures that can be added to a work plan for a period is 300. This number must be 300 or less.
27.	Click the Work Plan Overview Report link to view the work plan information in a PDF format, if you are interested in viewing this information. Note: This is an optional step.

SFS Handbook: Grantee Processing in SFS

NY_GG_CNT_WP.pdf x +

— + [] 1 of 2 | ↺ | []

*ATTACHMENT C – WORK PLAN
SUMMARY*

PROJECT NAME:
CONTRACTOR NAME: [REDACTED]
SET ID: SHARE VERSION: 1 PERIOD: 1
CONTRACT PERIOD: From: 1/1/2024
 To: 12/31/2024

Project Summary: [REDACTED]

Step	Action
28.	When you are finished reviewing the Work Plan Overview Report document, click the Close (X) button.

SFS Handbook: Grantee Processing in SFS

Grants Work Plan

Help reduce drug deaths.

Objectives >> Tasks >> Performance Measures ⓘ

Objective Task Perf. Measure Display Type: All

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
1 ☐	▼ Objective	1	Reduce Opioid related deaths	Reduce Opioid related deaths	☐	☐
2 ☐	▼ Task	1.1	Educate community members on	Educate community members on correct	☐	☐
3 ☐	Performance Measure	1.1.1	Number of community members trained	Number of community members trained	☐	☐
4 ☐	▼ Objective	2	Increase the number of opioid related	Increase the number of opioid related	☐	☐
5 ☐	▼ Task	2.1	Distribute narcain kits to trained	Distribute narcain kits to trained	☐	☐
6 ☒	Performance Measure	2.1.1	Number of kits distributed	Number of kits distributed	☐	☐

Objective Task Perf. Measure Display Type: All

OK Cancel Apply Refresh

Step	Action
29.	Click the More Details tab.

Grants Work Plan

Help reduce drug deaths.

Objectives >> Tasks >> Performance Measures ⓘ

Objective Task Perf. Measure Display Type: All

Basic Info More Details

Select	Type	Sort Order	Allow Performance Measure	Perf Measure Response Type	Numeric (Target/Goal)	Text/Comment (Target/Goal)	Include in Progress Report
1 ☐	▼ Objective	1					
2 ☐	▼ Task	1.1	☐				
3 ☐	Performance Measure	1.1.1		Numeric	100		☐
4 ☐	▼ Objective	2					
5 ☐	▼ Task	2.1	☐				
6 ☒	Performance Measure	2.1.1		Numeric	100		☐

Objective Task Perf. Measure Display Type: All

OK Cancel Apply Refresh

Step	Action
30.	In this example, we are updating the target value for the second performance measure. We will change the Numeric (Target/Goal) field to 50 .

SFS Handbook: Grantee Processing in SFS

Step	Action
31.	Click the Apply button to save any changes.
32.	Click the OK button to return to the Document Management page.

The screenshot shows the 'Documents' page in the SFS system. At the top, there's a search bar and a 'Documents' header. Below the header, document details are listed: Description (OKIH01-C00073GM-3650000), Document Administrator, Approval Start Date (04/23/2024 12:51PM), Begin Date (01/01/2024), Expire Date (12/31/2024), Document Status (Pending Review), and Owner. A section titled 'Information Available for Review' contains a table with 12 columns: Period Start Date, Period End Date, Period Amount, Budget Detail Period, Budget Detail Status, Budget Detail Review Date, Budget Period Mark as Reviewed, Work Plan Period, Workplan Detail Status, Work Plan Review Date, and Workplan Period Mark as Reviewed. The first row of data shows Period 1 from 01/01/2024 to 12/31/2024 with an amount of 22,000,000. The 'Budget Period Mark as Reviewed' and 'Workplan Period Mark as Reviewed' checkboxes are highlighted with green boxes. Below the table is a 'Comments History' section and a 'Comments' text area. At the bottom, there are buttons for 'Approve', 'Deny', 'Pushback', 'View Document', 'Add Additional Attachments', 'Send E-Mail', and 'View Executed Documents'.

Step	Action
33.	When you have finished reviewing the Budget Period information, select the Budget Period Mark as Reviewed checkbox to update the Budget Detail Status to Reviewed.
34.	When you have finished reviewing the Work Plan Period information, select the Work Plan Period Mark as Reviewed checkbox to update the Work Plan Detail Status to Reviewed.
35.	Enter any comments for the agency in the Comments field. Note: The Comments field could be used to summarize the changes you made.
36.	Note: - To upload and attach documents to a contract, click the Add Additional Attachments link. - Vendors can only add attachments to their contracts during collaboration.

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Mark as Reviewed checked (30001,1114)

Warning! Are you sure you want to mark this contract as reviewed? Once the contract is marked as reviewed, you will be unable to make any further updates and the NYS agency will be notified that this contract has been reviewed. Select Yes to continue with marking this contract as reviewed. Select No to cancel this action.

Yes

No

Step	Action
37.	Click the Yes button to continue marking this contract as reviewed. Note: Click the No button to cancel this action.
38.	Note: The Total Grant Funds Requested must be equal to the corresponding Period Amount . If they are not equal, then click the Period link under the Budget Detail Period heading and update the Total Grant Funds Requested amount so it is equal to the Period Amount .
39.	Note: • If you want to return the contract back to the agency contract manager for updates, click the Deny button. • If you want to return the contract to the previous step in the workflow, click the Pushback button.
40.	You have successfully completed the Update Contract Period Budget and Work Plan Information and Complete Review of a Contract during Collaboration topic.

Apply an Electronic Signature to a Contract Agreement

Topic Description:

This topic provides the knowledge and skills to approve a contract and apply an electronic signature to a contract agreement.

Topic Objectives:

In this topic, you will learn how to:

- Approve a Contract
- Apply an Electronic Signature to a Contract Agreement

SFS role required to perform this task:

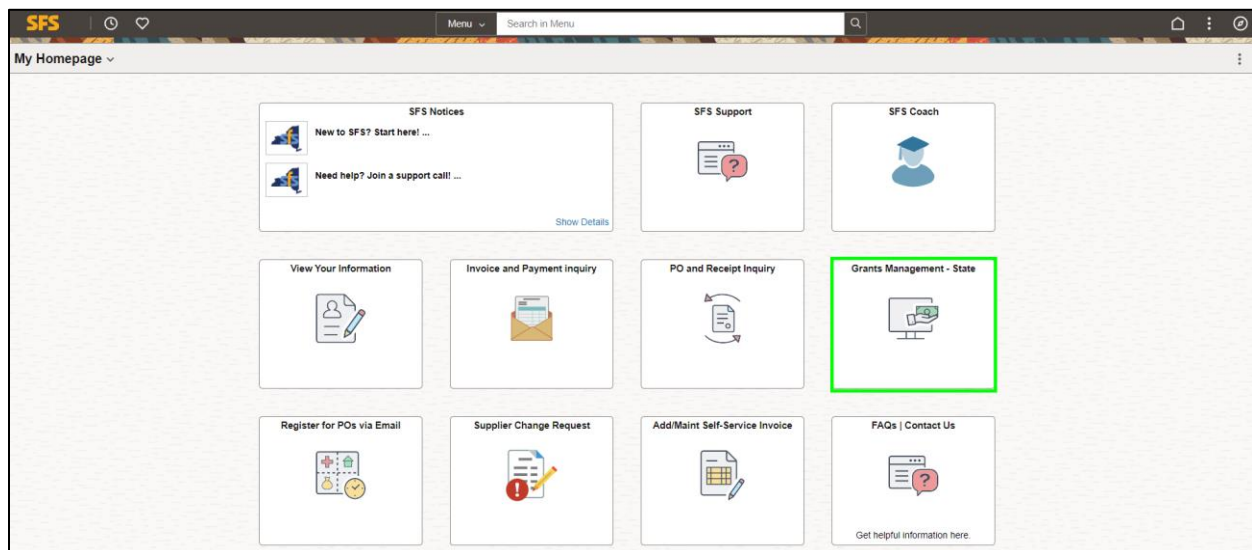
- Grants Contract Approver (NY_ES_SUPPLIER_CONTRACT_APPRVR)

Procedure

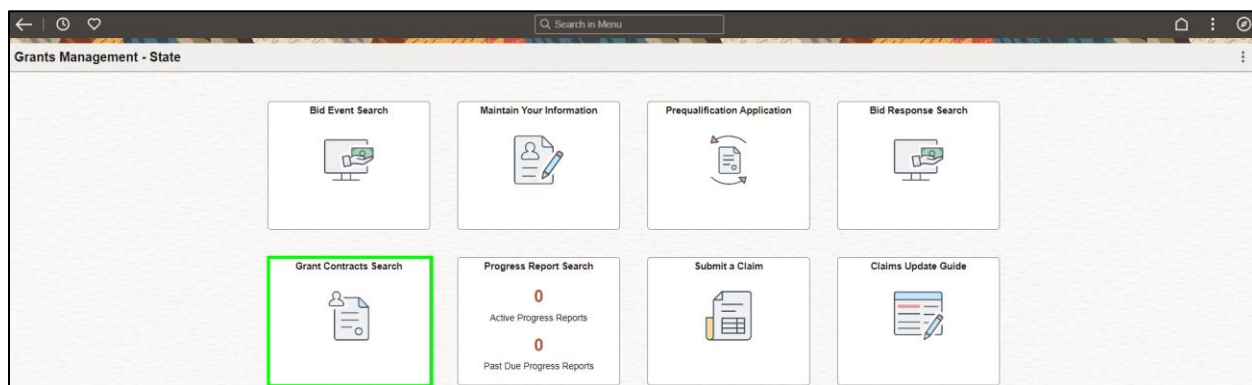
Scenario: You have been awarded a grant contract. You will view the contract agreement that is pending approval and then approve and sign the contract, so it routes to the agency for approval.

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Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



Step	Action
1.	Preferred Navigation: Click the Grant Management – State tile. Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Maintain Contract Documents Note: You must log in to the SFS Vendor Portal to approve a grant contract.



Step	Action
2.	Click the Grant Contracts Search tile.

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Maintain Contract Documents

Document Search

Business Unit

Document Administrator

NYS Contract #

From Begin Date To Begin Date

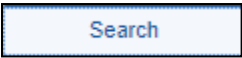
From End Date To End Date

☐ All Documents ☒ Pending Review

> Advanced Search Criteria

List of Documents

Contract Document	Description	Document Status	NYS Contract Description	NYS Contract #	Contract Max. Amount	Contract Type	Status Date

Step	Action
3.	Enter the agency's business unit into the Business Unit field or click the magnifying glass to search for the information. If you are unsure of the business unit for the State Agency you are doing business with, click the magnifying glass to view a list of business units and state agencies.  Note: If you do not know any criteria, you can leave the search criteria in the Document Search section blank.
4.	To view grant contracts that are pending review and approval, verify the Pending Review checkbox is selected. Note: To view grant contracts that are pending review and grant contracts that have previously been approved, verify the All Documents checkbox is selected.
5.	Click the Search button. 

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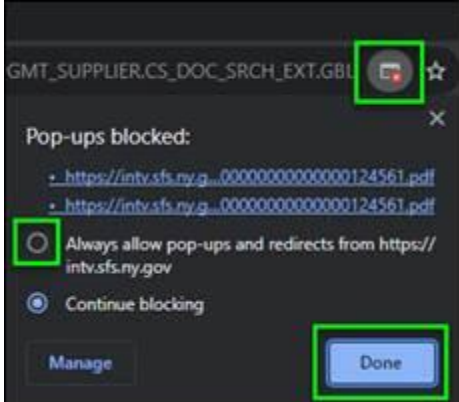
[illegible]

Step	Action
6.	Click the applicable Contract ID from the search results. If your organization has more than ten contract results, use the View All button to show all results on one page. Note: If your organization has multiple people assigned to the Grants Contract Approver role, please work within your organization to determine who is responsible for approving each grant contract, as only one person can approve a specific grant contract in SFS.

[illegible]

Step	Action
7.	Click the View Contract Agreement button to view the Contract Agreement in a new browser window.

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Step	Action
8.	Note: If you do not see this popup, it may be blocked by your browser. Please click the blocked popup icon in the address bar, select the option to “Always allow pop-ups and redirects from https://esupplier.sfs.ny.gov/psp/fscm/SUPPLIER/?cmd=login” and click the Done button. Following this, click the View Contract Agreement button again to view the new browser window. 

STATE OF NEW YORK MASTER CONTRACT FOR GRANTS FACE PAGE	
STATE AGENCY (Name & Address): Office of Mental Health 44 Holland Avenue Albany, NY 12229	BUSINESS UNIT/DEPT ID: OMH01 1100206 CONTRACT NUMBER: OMH01-00124GM-1100206 CONTRACT TYPE:
CONTRACTOR NAME: STAPLES INC	TRANSACTION TYPE: New
	PROJECT NAME:
CONTRACTOR IDENTIFICATION NUMBERS: NYS Vendor ID Number: 1000053985 Federal Tax ID Number:	CFDA NUMBER (Federally Funded Grants Only):
CONTRACTOR PRIMARY MAILING ADDRESS: PO BOX 415256 DEPT ROC BOSTON, MA 02241-5256 CONTRACTOR PAYMENT ADDRESS: ☒ Check if same as primary mailing address CONTRACTOR MAILING ADDRESS: ☒ Check if same as primary mailing address	CONTRACTOR STATUS: ☐ For Profit ☐ Municipality ☐ Tribal Nation ☐ Individual ☐ Not-For- Profit Charities Registration Number: Exemption Status/Code: ☐ Sectarian Entity

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Step	Action
9.	When you are finished reviewing the Contract Agreement document, click the Close (X) button. 

Documents

Maintain Contract Documents

Document Management

Contract ID

000000000000000000000000141465

Description

OMH01-C00073GM-3650000

Document Administrator

Approval Start Date

04/23/2024 12:51PM

Begin Date

01/01/2024

Expire Date

12/31/2024

Document Status

Pending Review

Owner

Return to Document Search

By clicking the 'Approve' button, I, acting in the capacity as Contractor, certify that I am the signing authority, or have been delegated or designated the authority as the signing authority or official, and as such I do agree, and I have the authority to agree, to all of the terms and conditions set forth in the Master Contract, including all appendices and attachments. I understand that (i) payment of a claim on this Master Contract is conditioned upon the Contractor's compliance with all applicable conditions of participation in this program and (if I am acting in the capacity as a not-for-profit Contractor) the accuracy and completeness of information submitted to the State of New York through the SFS vendor prequalification process and (ii) by electronically indicating my acceptance of the terms and conditions of the Master Contract, I certify that (a) to the extent that the Contractor is required to register and/or file reports with the Office of the Attorney General's Charities Bureau ('Charities Bureau'), the Contractor's registration is current, all applicable reports have been filed, and the Contractor has no outstanding requests from the Charities Bureau relating to its filings and (b) all data and responses in the application submitted by the Contractor are true, complete and accurate. I also understand that use of my email and User ID and Password to access the State's contract management system is equivalent to having placed my signature on the Master Contract and that I am responsible for any activity attributable to the use of my User ID and Password. Additionally, any information entered will be considered to have been entered and provided at my direction. I further certify and agree that the Contractor agrees to waive any claim that this electronic record or signature is inadmissible in court, notwithstanding the choice of law provisions.

Approve

Deny

View Approvals

View Contract Agreement

No Attachments/Related Documents Exist

Send E-Mail

View Executed Documents

Step	Action
10.	Click the Approve button.

[illegible]

SFS Handbook: Grantee Processing in SFS

Step	Action
11.	The Title page appears. Enter the Title you wish to display in the signature block within the agreement. This should be your official title at your organization (e.g., President). Note: Once you enter a title the first time, the title you entered the previous time will be displayed by default the next time you sign an agreement in SFS. If your title has changed, then update the value.
12.	Click the OK button.

Q Search in Menu

Documents

Maintain Contract Documents

New Window | Help | Personalize Page

Document Management

Return to Document Search

Contract ID
Description
Document Administrator
Approval Start Date
Begin Date
Expire Date
Document Status
Owner

000000000000000000141465
OMH01-C00073GM-3650000

04/23/2024 12:51PM
01/01/2024
12/31/2024
Pending Review

View Approvals

View Contract Agreement

No Attachments/Related Documents Exist
Send E-Mail
View Executed Documents

Step	Action
13.	Click the View Contract Agreement button.

AGREEMENT_000000000000000000000000117_ 3 / 30 — 100% + [] []		is conditioned upon the Contractor's compliance with all applicable conditions of participation in this program and (if I am acting in the capacity as a not-for profit Contractor) the accuracy and completeness of information submitted to the State of New York through the Gateway vendor prequalification process and (i) by electronically Master Contract, I certify that (a) to the extent that the Contractor is required to register and/or file reports with the Office of the Attorney General's Charities Bureau ("Charities Bureau"), the Contractor's registration is current, all applicable reports have been filed, and the Contractor has no outstanding requests from the Charities Bureau relating to its filings and (b) all data and response in the application submitted by the Contractor are true, complete and accurate. I also understand that use of my assigned User ID and Password on the State's contract management system is equivalent to having placed my signature on the Master Contract and that I am responsible for any activity attributable to the user of my User ID and Password. Additionally, any information entered will be considered to have been entered and provided at my direction. I further certify and agree that the Contractor agrees to waive any claim that this electronic record or signature is inadmissible in court, notwithstanding the choice of law provisions.	
CONTRACTOR: LLC _____		By: _____ Printed Name	
By: John Doe _____ Printed Name		Title: Deputy Director _____ Date: 05/23/2023 _____	
ATTORNEY GENERAL'S SIGNATURE APPROVED AS TO FORM		STATE COMPTROLLER'S SIGNATURE	
By: _____ Printed Name		By: _____ Printed Name	
Title: _____		Title: _____	

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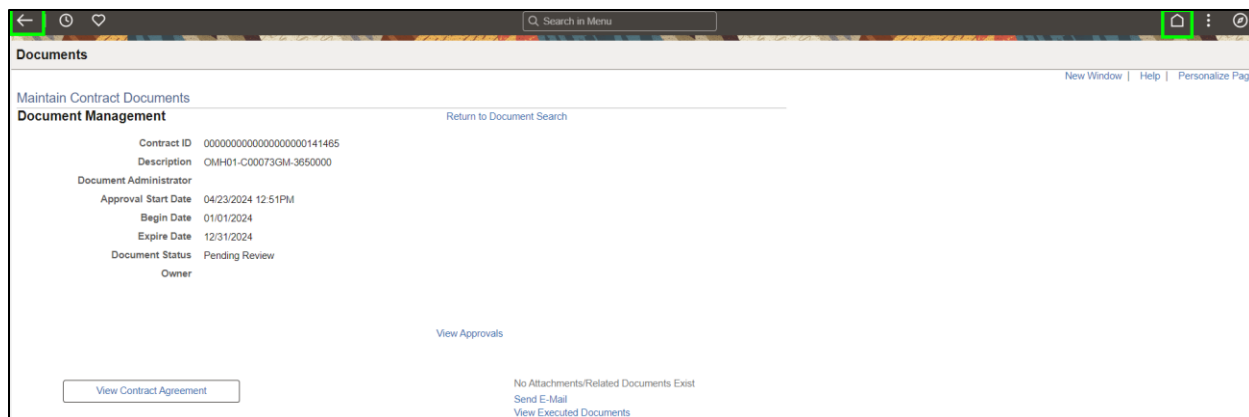
Step	Action
14.	The Title , Date , and Signature of the Approval display on the Contract Agreement.

SFS Intranet - Home | Documents | AGREEMENT_0000000000000000117... | 3 / 30

is conditioned upon the Contractor's compliance with all applicable conditions of participation in this program and (if I am acting in the capacity as a not-for profit Contractor) the accuracy and completeness of information submitted to the State of New York through the Gateway vendor prequalification process and (ii) by electronically Master Contract, I certify that (a) to the extent that the Contractor is required to register and/or file reports with the Office of the Attorney General's Charities Bureau ("Charities Bureau"), the Contractor's registration is current, all applicable reports have been filed, and the Contractor has no outstanding requests from the Charities Bureau relating to its filings and (b) all data and response in the application submitted by the Contractor are true, complete and accurate. I also understand that use of my assigned User ID and Password on the State's contract management system is equivalent to having placed my signature on the Master Contract and that I am responsible for any activity attributable to the user of my User ID and Password. Additionally, any information entered will be considered to have been entered and provided at my direction. I further certify and agree that the Contractor agrees to waive any claim that this electronic record or signature is inadmissible in court, notwithstanding the choice of law provisions. CONTRACTOR: LLC By: John Doe Printed Name Title: Deputy Director Date: 05/23/2023	By: _____ Printed Name Title: _____ Date: _____
ATTORNEY GENERAL'S SIGNATURE APPROVED AS TO FORM By: _____	STATE COMPTROLLER'S SIGNATURE By: _____

Step	Action
15.	Click the Close (X) button. 

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Step	Action
16.	Click the Document (<) button or the Home Button, to navigate away from the Maintain Contract Documents page.
17.	You have successfully completed the Apply an Electronic Signature to a Contract Agreement topic.

Complete Performance Measures for a Progress Report and Submit a Progress Report for Agency Review

Topic Description:

This topic provides the knowledge and skills to complete performance measures for a progress report and then submit a progress report for agency review and approval.

Progress reporting is a tool that measures the progress of the grant contract over its lifetime in SFS.

Topic Objectives:

In this topic, you will learn:

- How to update and complete Performance Measures for a Progress Report
- Submit a Progress Report for Agency Review and Approval

SFS role required to perform this task:

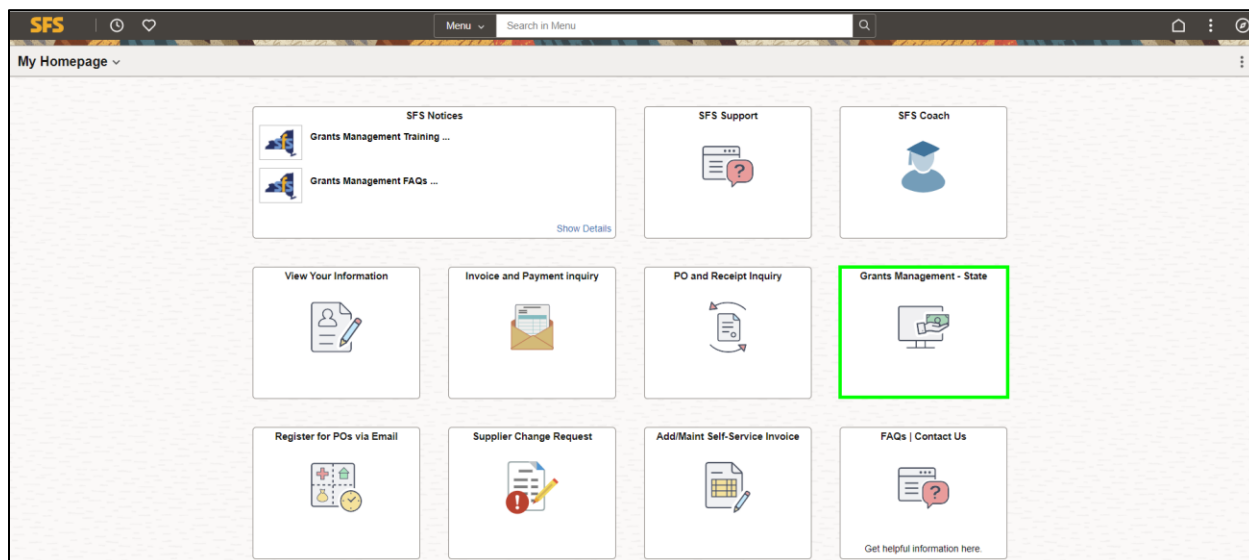
- Progress Report Processor (NY ES SUPPLIER PRGRPT USER)

Procedure

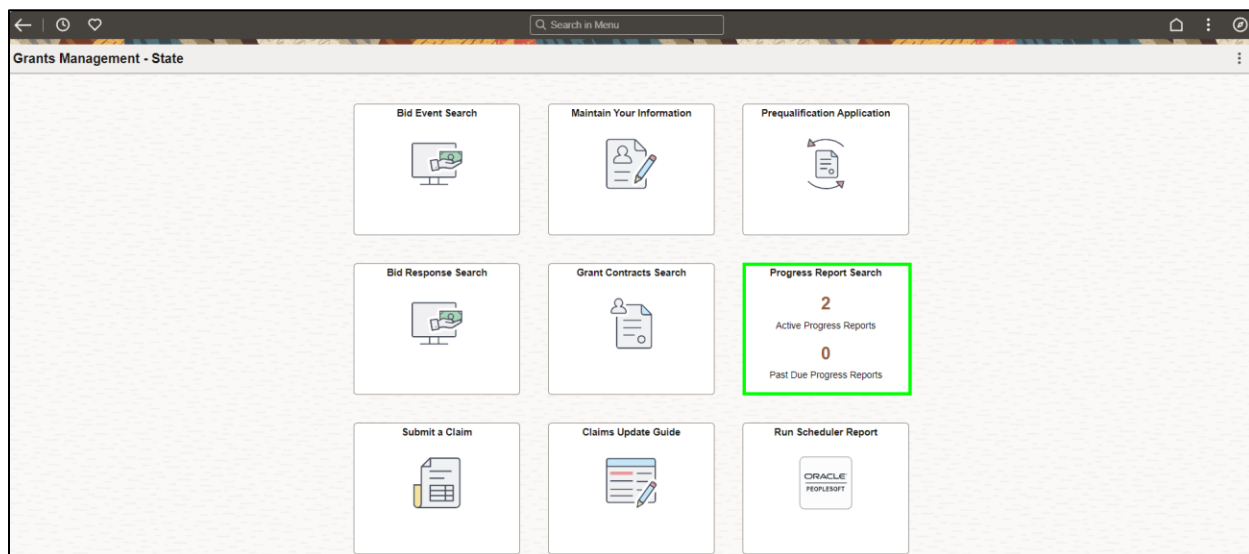
Scenario: Your grant contract has been approved and you are performing the work that is outlined in the contract agreement. As a Grantee User, it is time for you to complete performance measures on a progress report and then submit the progress report for agency review and approval.

SFS Handbook: Grantee Processing in SFS

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



Step	Action
1.	Preferred Navigation: Click the Grant Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Manage Progress Reports Note: You must log in to the SFS Vendor Portal to submit a progress report.



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Step	Action
2.	Click the Progress Report Search tile.

Manage Progress Reports										
All Progress Reports	23	Re-Assign User								
Not Submitted	0									
Pending Review	2									
Information Requested	0									
Approved	0									
Past Due	1									
Due within 60 days	2									
Not Started	21									
Contract #	Contract ID	Period #	Report Description	Due Date	Status	Agency Name	Project Name	User Assigned	Supplier Name	
☐ DOH01-C36877GG-3450000	0000000000000000000000095472	3	Period 3 - Report 3	04/30/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John		
☐ DOH01-C36877GG-3450000	0000000000000000000000095472	3	Period 3 - Report 4	05/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John		
☐ DOH01-C36877GG-3450000	0000000000000000000000095472	3	Period 3 - Report 5	06/30/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John		
☐ DOH01-C36877GG-3450000	0000000000000000000000095472	3	Period 3 - Report 6	07/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John		
☐ DOH01-C36877GG-3450000	0000000000000000000000095472	3	Period 3 - Report 7	08/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John		
☐ DOH01-C36877GG-3450000	0000000000000000000000095472	3	Period 3 - Report 8	09/30/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John		
☐ DOH01-C36877GG-3450000	0000000000000000000000095472	3	Period 3 - Report 9	10/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John		
☐ DOH01-C36877GG-3450000	0000000000000000000000095472	3	Period 3 - Report 10	11/30/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John		
☐ DOH01-C36877GG-3450000	0000000000000000000000095472	3	Period 3 - Report 11	12/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John		
☐ DOH01-C36877GG-3450000	0000000000000000000000095472	3	Period 3 - Report 12	01/31/2025	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John		

Step	Action
3.	The Manage Progress Reports search page is displayed with a default list of All Progress Reports available.
4.	Select the status tab on the left to display progress reports for an applicable view. Click the Not Started tab.
5.	Click the Filter icon to narrow down the number of progress reports that display. 

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Cancel

Filter

Done

Contract #

Contract ID

Period #

Report ID

Report Description

Status

Due Date From

Due Date To

Business Unit

Project Name

User Assigned

Supplier ID

Supplier Name

Clear

Step	Action
6.	Enter the applicable values in the Search Criteria fields or click the magnifying glass icon to search for the information. Note: • In order to search by Report Description, a Contract ID must be entered or selected first. • In order to search by Project Name, a Business Unit must be entered or selected first.

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Step	Action
7.	Click the Done button. In this example, we will not filter the progress reports.

Contract #	Contract ID	Period #	Report Description	Due Date	Status	Agency Name	Project Name	User Assigned	Supplier Name
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 3	04/30/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 4	05/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 5	06/30/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 6	07/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 7	08/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 8	09/30/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 9	10/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 10	11/30/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 11	12/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 12	01/31/2025	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	

Step	Action
8.	To re-assign a different grantee user to save and submit the progress report follow these steps: • Select the applicable progress report. • Click the Re-Assign User button at the top of the page. • Select the User ID to re-assign. • Click the Assign Supplier User button. Note: This is an optional step.

Contract #	Contract ID	Period #	Report Description	Due Date	Status	Agency Name	Project Name	User Assigned	Supplier Name
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 3	04/30/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 4	05/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 5	06/30/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 6	07/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 7	08/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 8	09/30/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 9	10/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 10	11/30/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 11	12/31/2024	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	
DOH01-C36877GG-3450000	000000000000000000095472	3	Period 3 - Report 12	01/31/2025	Not Started	Department of Health	DOH01-LEGHIV-2021	Doe, John	

Step	Action
9.	Select the applicable Report Description link to update and submit the progress report.

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Update Progress Report

Contract # DOH01-C36877GG-3450000 Report ID Period 3 - Report 3
 Period # 3 Report Period From 03/01/2024
 Agency Name Department of Health Report Period To 03/31/2024
 Status Not Started Due Date 04/30/2024

Attachment Response

Add Attachment Delete Attachment

Attached File

Save Submit for Review Cancel Approve Request Information Return

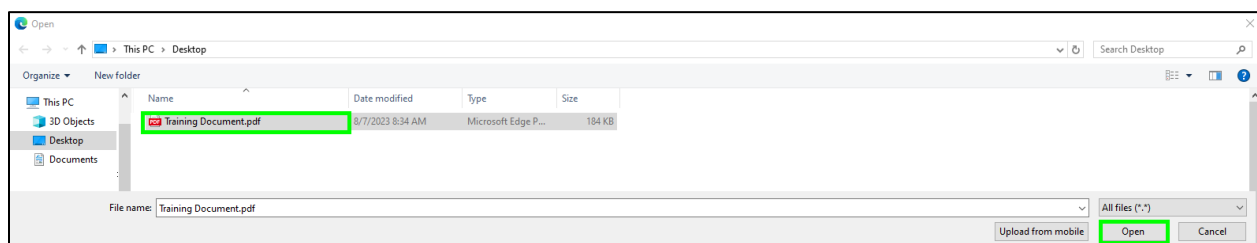
Step	Action
10.	Note: There are five Performance Measure Response Types that could be included on a progress report. They are as follows: • Attachment • Text/Comment • Numeric • Date • Yes/No Note: The View Text/Comment button will only display for the Text/Comment response type.
11.	In this example, the Attachment type is used on the progress report. Click the Add Attachment button to add your attachment to the progress report.

File Attachment [X]

Choose File No file chosen

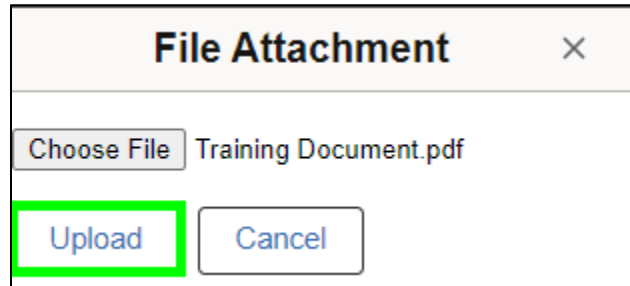
Upload Cancel

Step	Action
12.	Click the Choose File button.



SFS Handbook: Grantee Processing in SFS

Step	Action
13.	Select the File that you want to upload and click the Open button.



Step	Action
14.	Click the Upload button.

Step	Action
15.	Click the Save button.
16.	Click the Submit for Review button.

SFS Handbook: Grantee Processing in SFS

Step	Action
17.	Click the Yes button to continue sending the progress report to the agency for review and approval. Note: Click the No button to cancel this action which allows you to return to the progress report to make additional edits prior to submitting to the agency.
18.	You have successfully completed the Complete Performance Measures for a Progress Report and Submit a Progress Report for Agency Review topic.

Update and Re-submit a Returned Progress Report

Topic Description:

This topic provides the knowledge and skills to update and re-submit a progress report that was returned by the agency requesting additional information.

Topic Objectives:

In this topic, you will learn:

- How to update and re-submit a returned progress report.

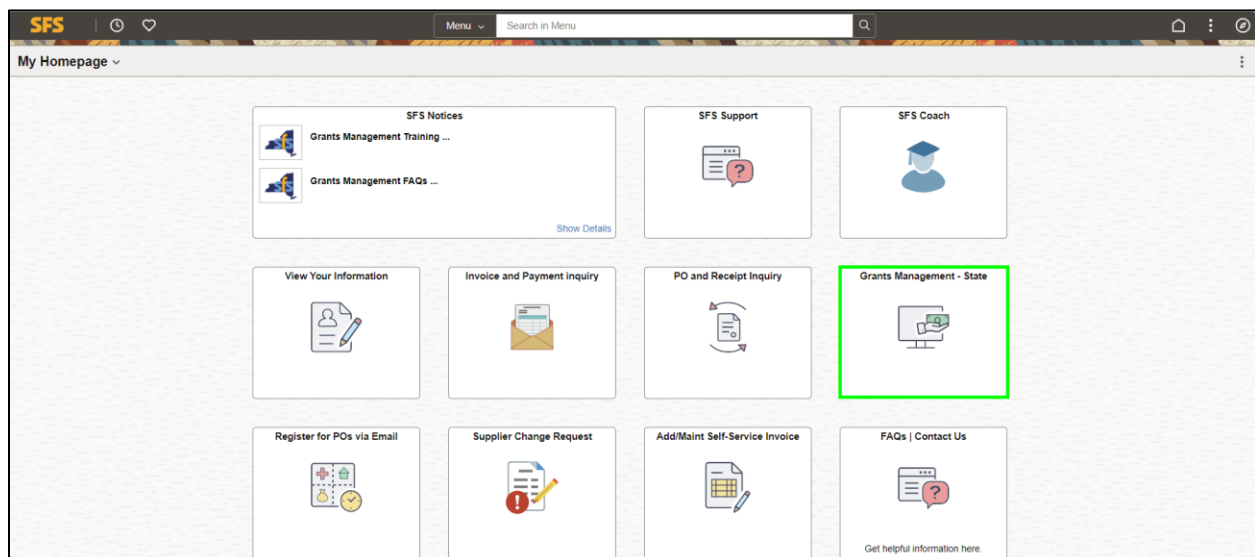
SFS role required to perform this task:

- Progress Report Processor (NY_ES_SUPPLIER_PRGRPT_USER)

Procedure

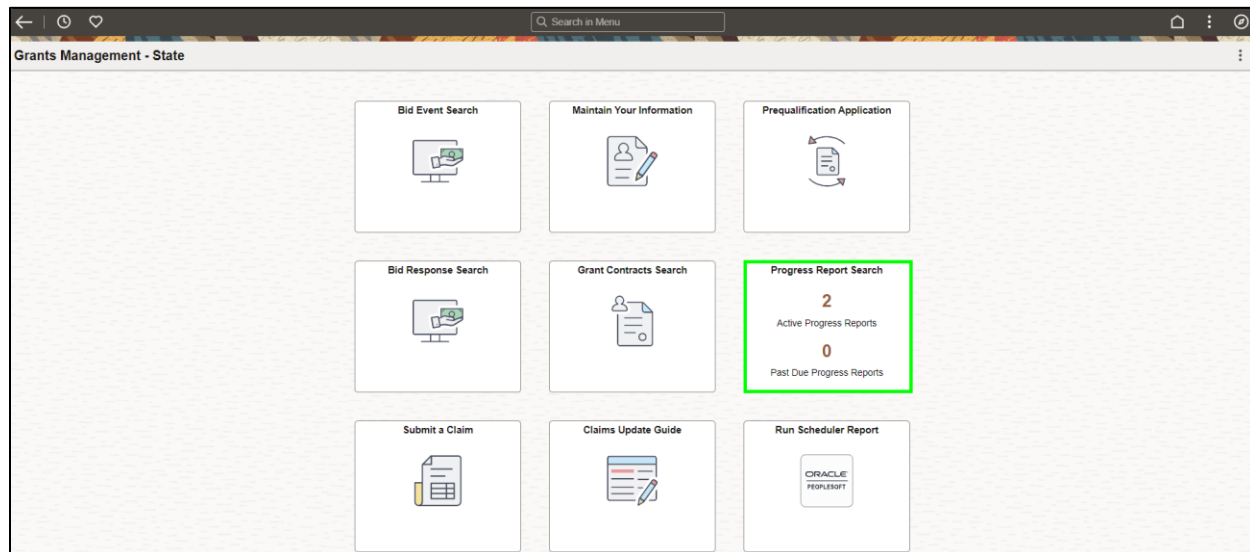
Scenario: You previously submitted a progress report to the agency for review and the agency has returned the progress report to you requesting additional information. You will update and re-submit a progress report that was returned by the agency requesting additional information.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

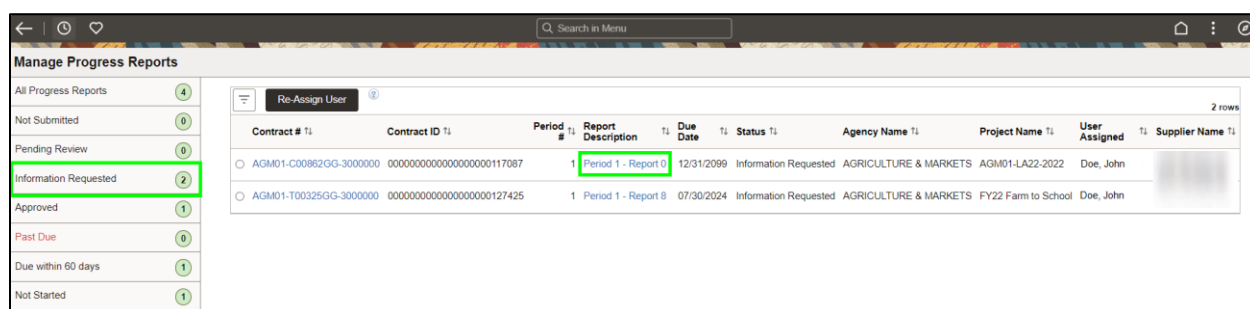


SFS Handbook: Grantee Processing in SFS

Step	Action
1.	Preferred Navigation: Click the Grant Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Manage Progress Reports. Note: You must log in to the SFS Vendor Portal to update and re-submit a progress report.



Step	Action
2.	Click the Progress Report Search tile.



Step	Action
3.	The Manage Progress Reports search page is displayed with a default list of All Progress Reports available.
4.	Select the status tab on the left to display progress reports for an applicable view. Click the Information Requested tab.

SFS Handbook: Grantee Processing in SFS

Step	Action
5.	Select the applicable Report Description link to update and submit the progress report.

Step	Action
6.	Click the View Approvals link to view the agencies comment(s) on what they want updated on the progress report.

Step	Action
7.	Expand the Comments section to view the comments from the agency.
8.	Click the Close (X) icon in the upper right corner of the page to close the Contract Progress Report Approval page.

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Update Progress Report

Contract # AGM01-C00862GG-3000000 Report ID Period 1 - Report 0 [View Approvals](#)

Period # 1 Report Period From 12/31/2099

Agency Name AGRICULTURE & MARKETS Report Period To 12/31/2099

Status Information Requested Due Date 12/31/2099

Attachment Response

[Add Attachment](#) [Delete Attachment](#)

Attached File C00865GG_Oct_to_Dec_2023_NarrativeReport_1_Attachment.pdf

[Save](#) [Submit for Review](#) [Cancel](#) [Approve](#) [Request Information](#) [Return](#)

Step	Action
9.	Update the progress report as needed. In this example, click the Delete Attachment button to delete the current attachment.

Update Progress Report

Contract # AGM01-C00862GG-3000000 Report ID Period 1 - Report 0 [View Approvals](#)

Period # 1 Report Period From 12/31/2099

Agency Name AGRICULTURE & MARKETS Report Period To 12/31/2099

Status Information Requested Due Date 12/31/2099

Attachment Response

[Add Attachment](#) [Delete Attachment](#)

[Save](#) [Submit for Review](#) [Cancel](#) [Approve](#) [Request Information](#) [Return](#)

Step	Action
10.	Click the Add Attachment button to upload the new attachment.

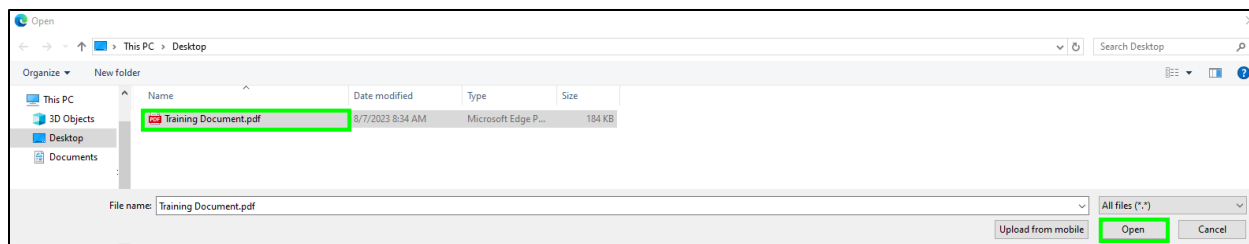
File Attachment ×

[Choose File](#) No file chosen

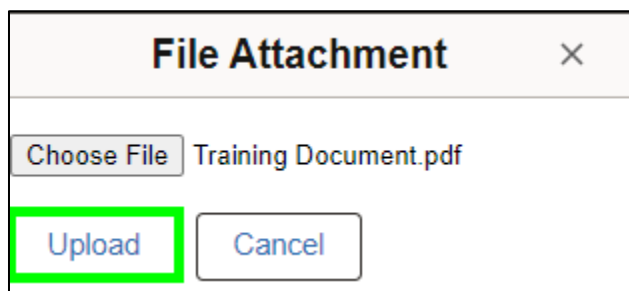
[Upload](#) [Cancel](#)

Step	Action
11.	Click the Choose File button.

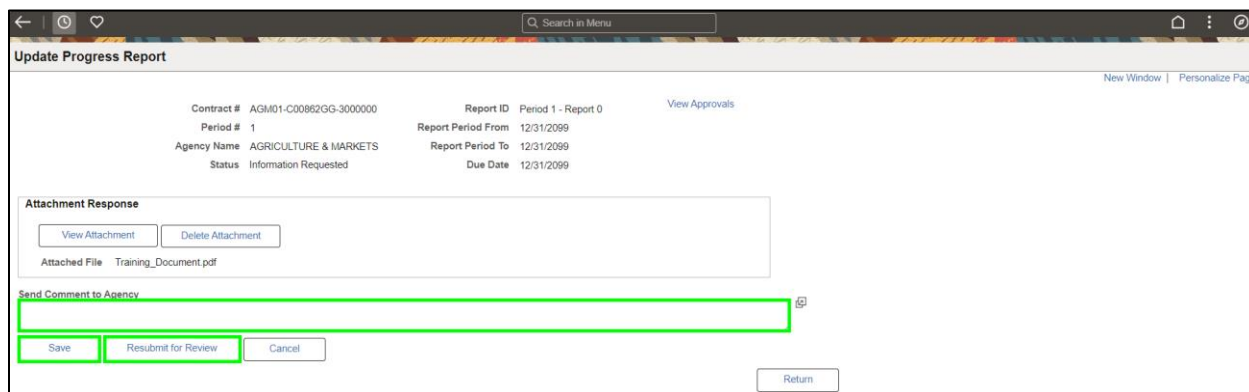
SFS Handbook: Grantee Processing in SFS



Step	Action
12.	Select the File that you want to upload and click the Open button.



Step	Action
13.	Click the Upload button.



Step	Action
14.	Click the Save button to save your changes.
15.	Enter the applicable comment in the Send Comments to Agency field.
16.	Click the Resubmit for Review button to resubmit the progress report to the agency for review.

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Are you sure you are finished with updating this progress report and it is ready to be submitted for review by the agency?

Once the progress report has been submitted to the agency, you will be unable to make any further updates. Select Yes to continue with sending this progress report to the agency. Select No to cancel this action. (0,0)

Step	Action
17.	Click the Yes button to continue sending the progress report back to the agency for review and approval. Note: Click the No button to cancel this action which allows you to return to the progress report to make additional edits prior to submitting to the agency.
18.	You have successfully completed the Update and Re-submit a Returned Progress Report topic.

Entering and Maintaining Grant Claims

Lesson Description:

This lesson provides the knowledge and skills to enter and maintain grant claims. Grantees will continue to submit claims against their approved contract budget. Grantees should enter claims into SFS on their own behalf, however, SFS supports the option for agencies to have grantees submit claims offline and designate agency staff to perform proxy entry, certification, and submission of claims on behalf of the grantee.

Claims in SFS can include multiple claim lines – so a claim could include both an advance for one period and a reimbursement for another period.

Claims are submitted by selecting a single contract and one or many open contract periods to include in the claim.

In SFS, there are two different formats available to collect claim information against the contract period – Advance/Initial Payment and Reimbursements.

- Advance/Initial Payment enables grantees to enter a request for an advance amount up to the remaining available advanced amount for the contract line.
- Reimbursement enables grantees to enter the requested reimbursement amounts by contract period and budget category.

Grantees are expected to provide supporting information to the claim including Budget Category breakdown/details (Salary detail, etc.).

- Additional details, including receipts and payroll documentation, would be provided via an attachment.

Lesson Objectives:

In this lesson, you will learn how to:

- Enter a New Claim for an Advance/Initial Amount
- Enter a New Claim for Reimbursement Amount
- Update an Existing Claim
- Certify and Submit a Claim

SFS Handbook: Grantee Processing in SFS

- Review In-Process Claims

Enter a New Claim – Advance/Initial Amount

Topic Description:

This topic provides the knowledge and skills to create and submit an advance/initial payment.

Note: The person who submits a grant claim will receive an email notification only when the grant claim is returned by the agency claim approver 1. There are no other email notifications for claims.

Topic Objective:

In this topic, you will learn:

- How to submit a claim for an advance/initial payment

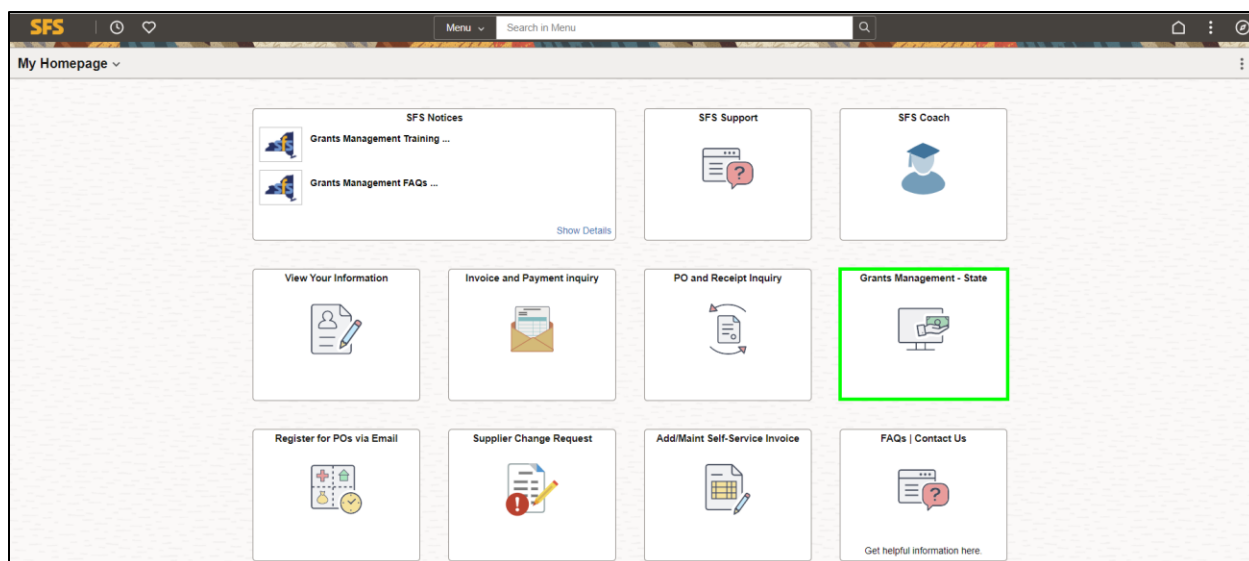
SFS role(s) required to perform this task:

- Claim Initiator (NY_EM_SUPPLIER_CLAIM_ENTRY)
 - **Note:** This role allows you to enter a request for an advance (if allowed on the contract) or reimbursement claim. This role does not have the ability to certify or submit the claim.
- Claim Certifier and Submitter (NY_EM_SUPPLIER_CLAIM_CERT_SUB)
 - **Note:** This role allows you to certify and submit a request for an advance (if allowed on the contract) or reimbursement claim.

Procedure:

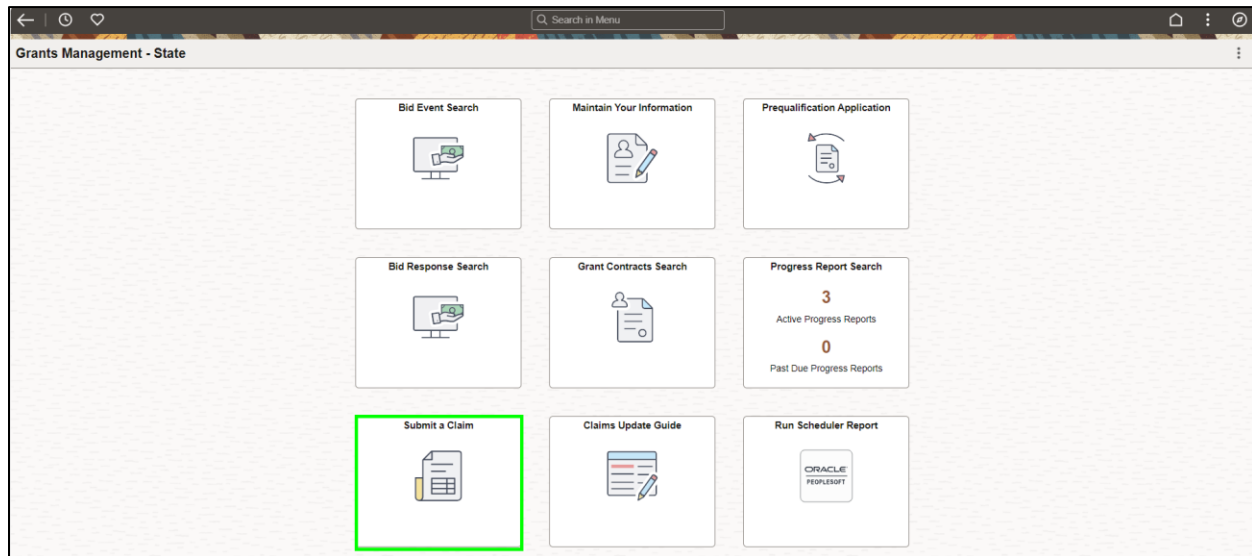
Scenario: You want to submit an advance/initial payment claim on an approved grant contract with remaining funds available.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

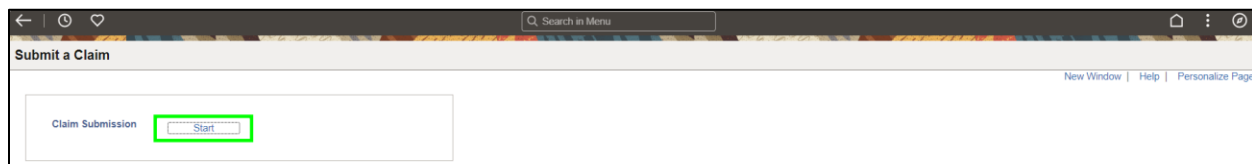


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Step	Action
1.	Navigation: Click the Grants Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > eSettlements > Submit a Claim. Note: You must log in to the SFS Vendor Portal to enter a claim.



Step	Action
2.	Click the Submit a Claim tile.



Step	Action
3.	Click on the Claim Submission Start button.

SFS Handbook: Grantee Processing in SFS

Next >

Claim Entry and Submission

Contract Selection

- ☒ Complete
- ☐ Not Started

Business Unit: OMH01 Claim Number: NEXT

[New Window](#) | [Help](#) | [Personalize Page](#)

⚠ If a contract you are searching for is missing from the list, please contact the awarding agency for further information.

Select the contract for the claim that is being entered

Select	Contract ID	Description	NYS Contract#	Begin Date	Expire Date	Agency Name	Contract Total
☐	000000000000000000000000102164	FFY21 Rent Relief ARP	C00884G	10/01/2021	09/30/2023	TDA01	7,760,554.00
☒	000000000000000000000000141328	Capital Equipment - HD	CC00041GM	03/19/2024	03/19/2025	OMH01	5,000.00
☐	000000000000000000000000141335	Capital Equipment - HD	CC00050GM	03/19/2024	03/19/2025	OMH01	5,000.00

Step	Action
4.	A listing of the first five available contracts display. To view more than five contracts, click the View All link, if applicable.
5.	Click the check box to select the applicable contract. Note: Contract Selection train stop updates to Complete.
6.	Click the Next button on the top right-hand corner of the page.

X

Exit

Claim Entry and Submission

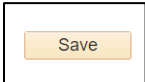
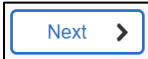
< PreviousNext >

New Window | Help | Personalize Page

Contract Selection Complete	Enter your organization's reference number for this claim. In addition, please review and update your vendor location if needed.
Claim Header Complete	Business Unit: CMH01 Claim Number: 900000284
Claim Lines Not Started	Contract ID: 00000000000000000000000141326 Description: Capital Equipment - HD Project Name: 0000000000012118 Contract Begin Date: 03/19/2024 Contract Expire Date: 03/19/2025 Contract Max Amount: 5,000.00 Supplier ID: Test1278 Claim Initiated Date: 04/25/2024 Supplier ID: 100000386 Supplier Name: [REDACTED] Supplier Location: MAINEPHY [G] HEMPSTEAD NY 11550 Claim Status: In Process Claim Date: 04/25/2024 [B] Claim Type: Regular
Claim Line Details Not Started	
Claim Summary Not Started	Header Attachments Save

Step	Action
7.	Verify contract details on the Claim Header page.
8.	Vendor Location values can be selected using the Supplier Location magnifying glass icon if needed. Note: Vendor Location is a default set of rules, or attributes, that define how an agency conducts business with a particular grantee. A vendor location comprises information such as payment terms, payment options, pay to bank accounts, etc. Although a vendor location is not an address, it does reference addresses.
9.	Note: Change the Claim Date using the calendar icon if needed. Claim date defaults to the current date.
10.	Enter a unique Invoice ID up to 30 characters in the Invoice ID field.

SFS Handbook: Grantee Processing in SFS

Step	Action																				
11.	Click the Save button.  Note: • Claim Header train stop updates to Complete. • Claim Number populates upon save.																				
12.	Claim Status is In Process & will auto update throughout the claim process. Note: The Claim Status options are: <table border="1"> <thead> <tr> <th>Claim Status</th><th>Status Description</th></tr> </thead> <tbody> <tr> <td>Approved</td><td>Claim is fully approved by all four levels of Agency Workflow</td></tr> <tr> <td>Complete</td><td>Claim is saved at Claim Summary page, but not yet submitted</td></tr> <tr> <td>In Process</td><td>Claim is saved at Claim Header page</td></tr> <tr> <td>Closed</td><td>Agency Approver has rejected the claim. Claim cannot be resubmitted</td></tr> <tr> <td>New</td><td>Claim is started but not yet saved</td></tr> <tr> <td>Returned</td><td>Claim is Denied for more information/additional documentation</td></tr> <tr> <td>Submitted</td><td>Claim has been submitted for Agency Review</td></tr> <tr> <td>Under Agency Review</td><td>Claim is in Workflow Approval Process</td></tr> <tr> <td>Cancelled</td><td>Grantee/Agency Proxy canceled prior to submission</td></tr> </tbody> </table>	Claim Status	Status Description	Approved	Claim is fully approved by all four levels of Agency Workflow	Complete	Claim is saved at Claim Summary page, but not yet submitted	In Process	Claim is saved at Claim Header page	Closed	Agency Approver has rejected the claim. Claim cannot be resubmitted	New	Claim is started but not yet saved	Returned	Claim is Denied for more information/additional documentation	Submitted	Claim has been submitted for Agency Review	Under Agency Review	Claim is in Workflow Approval Process	Cancelled	Grantee/Agency Proxy canceled prior to submission
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Submitted	Claim has been submitted for Agency Review																				
Under Agency Review	Claim is in Workflow Approval Process																				
Cancelled	Grantee/Agency Proxy canceled prior to submission																				
13.	Click the Next button on the top right corner of the page. 																				

Claim Entry and Submission

[< Previous](#)
Next >

Contract Selection

✔ Complete

Claim Header

✔ Complete

Claim Lines

✔ Complete

Claim Line Details

☐ Not Started

Claim Summary

☐ Not Started

Select the Contract Period and Claim Line Type

Business Unit: OMH01 Claim Number: 000000284 ✖

Contract ID: 000000000000000000000000141326 Description: Capital Equipment - HD Project Name: 00000000000012118	Supplier ID: 1000000396 Supplier Name: [REDACTED] Supplier Location: MAINEPAY [REDACTED]
---	--

Contract Begin Date: 03/19/2024	Contract Status: In Process	HEMPSTEAD NY 11550
Contract Expire Date: 03/19/2025	Claim Date: 04/25/2024	
Contract Max Amount: 5,000.00	Claim Type: Regular	
Invoice ID: Test1278		
Claim Initiated Date: 04/25/2024		

🔍

Q

⏪ < 1-1 of 1 > ⏩ | View All

Line Number	Contract Period	Period From Date	Period To Date	Period Amount	Line Type		
1	1 🔍	03/19/2024	03/19/2025	5,000.00	Advance ▼	+	-

Save

SFS Handbook: Grantee Processing in SFS

Step	Action
14.	Choose a Contract Period by clicking on the magnifying glass next to the field. Note: You would select the available contract period based on the payment schedule and due date listed on the contract.
15.	Note: Contract Period is a date range defined by the agency where the period from and to dates fall within the contract begin and expire dates. Each period is assigned a sequential number beginning at 1.
16.	Note: The Line Type displays values for Advance or Initial Payment, if selected on the approved contract's payment schedule, and Reimbursement. The Reimbursement line type is discussed in the next topic in this lesson. In this example, click the Line Type dropdown menu and select the Advance line type.
17.	Click the Save button. Note: Claim Lines train stop updates to Complete.
18.	Click the Next button.

[illegible]

Step	Action
19.	Validate the Claim Line Details information and verify the Line type is Advance .
20.	Click the Line Comments button to add a line comment, if needed.

SFS Handbook: Grantee Processing in SFS

Claim Line Comments

×

[Help](#)

Business Unit

OMH01

Claim Number

000000284

Line Number

1

Q

⏪

⏩

1 of 1 ▾

⏴

⏵

View All

+

-

Comment

OK

Cancel

Step	Action
21.	Enter the applicable value in the Comment field. Note: Line comments are used to add any additional information pertaining to the line for the agency reviewers to view.
22.	Click the OK button.

[illegible]

Step	Action
23.	Click the Line Attachments button to add an attachment for the line, if needed.

SFS Handbook: Grantee Processing in SFS

Claims Attachments × Help

Business Unit OMH01 Claim Number 000000284 Line Number 1

1-1 of 1 | View All

Description	Add Attachment	View Attachment	Attached File
1	Add Attachment	View Attachment	

OK Cancel

Step	Action
24.	Click the Add Attachment button.

Business Unit OMH01 Claim Number 000000284 Line Number 1

1-1 of 1 | View All

Description	Add Attachment	View Attachment	Attached File
1	Add Attachment	View Attachment	

OK Cancel

File Attachment ×

Choose File No file chosen

Upload Cancel

Step	Action
25.	Click the Choose File button.

Open

→ This PC > Desktop

Search Desktop

Name	Date modified	Type	Size
Training Document.pdf	8/7/2023 8:34 AM	Microsoft Edge P...	184 KB

File name: Training Document.pdf

Upload from mobile **Open** Cancel

Step	Action
27.	Select the File that you want to upload and click the Open button.

SFS Handbook: Grantee Processing in SFS

Business Unit OMH01 Claim Number 000000284 Line Number 1

File Attachment

Choose File Training Document.pdf

Upload Cancel

OK Cancel

Step	Action
28.	Click the Upload button.

Claims Attachments

Business Unit OMH01 Claim Number 000000284 Line Number 1

Description Add Attachment View Attachment Attached File

1 Training Document Add Attachment View Attachment Training_Document.pdf

OK Cancel

Step	Action
29.	Enter a description of the document into the Description field.
30.	Click the OK button.

SFS Handbook: Grantee Processing in SFS

Contract Selection

Complete

Claim Header

Complete

Claim Lines

Complete

Claim Line Details

Visited

Claim Summary

Not Started

Project Name: 00000000012118

Supplier Location: MAINEPAY

Contract Begin Date: 03/19/2024

Contract Expire Date: 03/19/2025

Contract Max Amount: 5,000.00

Invoice ID: Test1278

Claim Initiated Date: 04/25/2024

Claim Status: In Process

Claim Date: 04/25/2024

Claim Type: Regular

HEMPSTEAD NY 11550

Claim Line Details

1 of 1

View All

Claim Line#: 1

Contract Period: 1

Period Date From: 03/19/2024

Period Date To: 03/19/2025

Line Type: Advance

Line Comments

Line Attachments

Advance Request Details

Period Total 5,000.00

Advance Percentage 10.00

Advance Amount Calculated 500.00

Advance Amount Requested 500.00

Advance Request Justification

Advance requested

Save

Step	Action
31.	Enter the applicable value into the Advance Amount Requested field. In this example, we will enter 500 into the Advance Amount Requested field.
32.	Enter the applicable justification into the Advance Request Justification field.
33.	Click the Save button. Save Note: Claim Lines Details train stop updates to Complete.
34.	Click the Next button. Next >

SFS Handbook: Grantee Processing in SFS

Claim Entry and Submission

Contract Selection Complete

Claim Header Complete

Claim Lines Complete

Claim Line Details Complete

Claim Summary Visited

Claim Line Summary

Line Number	Contract Period	Period From Date	Period To Date	Line Type	Amount Requested
1	1	03/19/2024	03/19/2025	Advance	500.00

Claim Line Comments Summary

Line Number	Comment	Comment Entered By	Comment Entered On
-------------	---------	--------------------	--------------------

Claim Line Attachment Summary

Line Number	File Name	Description	Uploaded by User	View Attachment
1	Training_Document.pdf	Training Document	1000000386	View Attachment

☒ Claim Entry Complete

I certify that the above bill is just, true and correct; that no part thereof has been paid except as stated and that the balance is actually due and owing, and that taxes for which the State is exempt are excluded.

Signatory Name 1000000386
Date 04/25/2024

[Save](#) [Submit](#)

Step	Action
35.	Validate all claim details.
36.	Click the Claim Entry Complete checkbox.
37.	Click the Certification checkbox
38.	Click the Save button.
39.	Click the Submit button. Note: Claim Summary train stop updates to Complete.
40.	Click the OK button. The Claim is now submitted into agency workflow and the claim Status changes to Agency Review .
41.	You have successfully completed the Enter a New Claim – Advance/Initial Amount topic.

Enter a New Claim - Reimbursement Amount

Topic Description:

This topic provides the knowledge and skills to create and submit a reimbursement payment.

Note: The person who submits a grant claim will receive an email notification only when the grant claim is returned by the agency claim approver 1. There are no other email notifications for claims.

Topic Objective:

SFS Handbook: Grantee Processing in SFS

In this topic, you will learn:

- How to submit a claim for a reimbursement payment

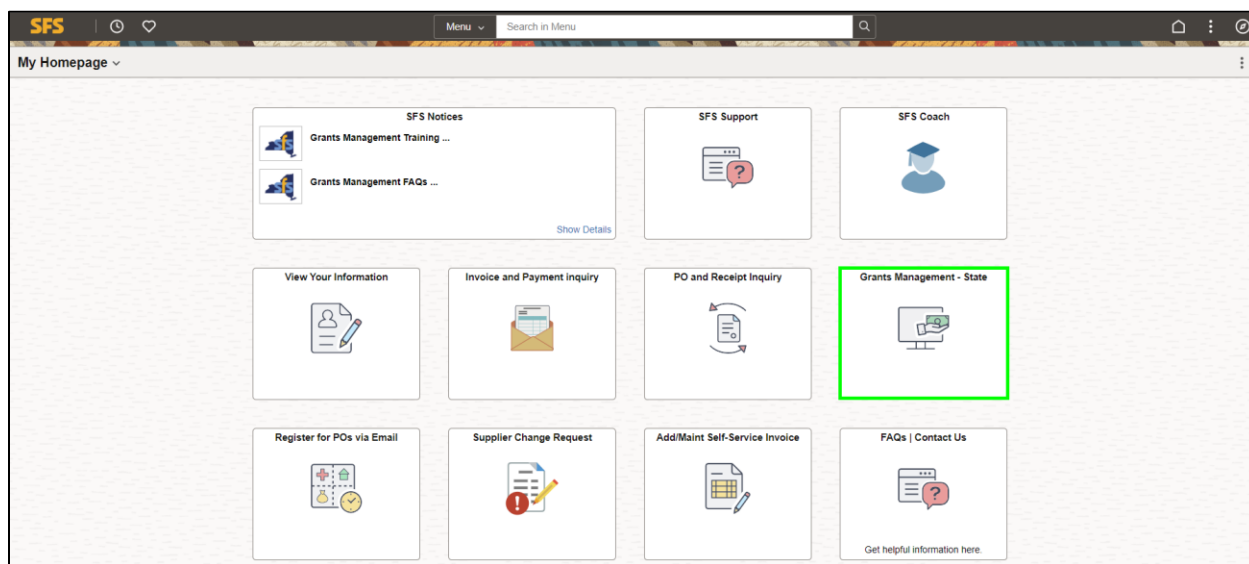
SFS role(s) required to perform this task:

- Claim Initiator (NY_EM_SUPPLIER_CLAIM_ENTRY)
 - **Note:** This role allows you to enter a request for an advance (if allowed on the contract) or reimbursement claim. This role does not have the ability to certify or submit the claim.
- Claim Certifier and Submitter (NY_EM_SUPPLIER_CLAIM_CERT_SUB)
 - **Note:** This role allows you to certify and submit a request for an advance (if allowed on the contract) or reimbursement claim.

Procedure:

Scenario: You want to submit a reimbursement payment claim on an approved grant contract with remaining funds available.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



Step	Action
1.	Navigation: Click the Grants Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > eSettlements > Submit a Claim. Note: You must log in to the SFS Vendor Portal to enter a claim.

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Grants Management - State

Bid Event Search 	Maintain Your Information 	Prequalification Application 
Bid Response Search 	Grant Contracts Search 	Progress Report Search 3 Active Progress Reports 0 Past Due Progress Reports
Submit a Claim 	Claims Update Guide 	Run Scheduler Report 

Step	Action
2.	Click the Submit a Claim tile.



Submit a Claim

Claim Submission

Start

Step	Action
3.	Click the Start button.

[X](#) Exit
Next >

Claim Entry and Submission

Contract Selection

☒ Complete

Claim Header

☐ Not Started

Claim Lines

☐ Not Started

Claim Line Details

☐ Not Started

Claim Summary

☐ Not Started

Business Unit: TDA#1 Claim Number: NEXT

▼ If a contract you are searching for is missing from the list, please contact the awarding agency for further information.

Select	Contract ID	Description	NY's Contract#	Begin Date	Expire Date	Agency Name	Contract Total
☒	000000000000000000000000102104	FFY21 Rent Relief ARP	C00884GO	10/01/2021	09/30/2023	TDA#1	7,760,554.00
☐	000000000000000000000000141326	Capital Equipment - HD	CC00041GM	03/19/2024	03/19/2025	OMH#1	5,000.00
☐	000000000000000000000000141335	Capital Equipment - HD	CC00050GM	03/19/2024	03/19/2025	OMH#1	5,000.00

Step	Action
4.	A listing of the first five available contracts display. To view more than five contracts, click the View All link, if applicable.
5.	Click the checkbox to select the appropriate contract. Note: Contract Selection train stop updates to Complete.

SFS Handbook: Grantee Processing in SFS

Step	Action
6.	Click the Next button.

×

Exit

⋮

Claim Entry and Submission

Contract Selection

Complete

Claim Header

Complete

Claim Lines

Not Started

Claim Line Details

Not Started

Claim Summary

Not Started

Enter your organization's reference number for this claim.

In addition, please review and update your vendor location if needed.

Business Unit: TDA01

Claim Number: 000005484

Contract ID: 000000000000000000000000102164

Supplier ID: 1000000386

Description: FFY21 Rent Relief ARP

Supplier Name:

Project Name: COVID19RENTARPZ

Supplier Location: MANNEPAY

Contract Begin Date: 10/01/2021

Claim Status: In Process

Contract Expire Date: 09/30/2023

Claim Date: 04/25/2024

Contract Max Amount: 7,750,554.00

Claim Type: Regular

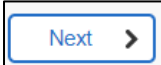
Invoice ID: 0004399

Claim Initiated Date: 04/25/2024

Header Attachments

Step	Action
8.	Verify contract details on the Claim Header page.
9.	Vendor Location values can be selected using the Supplier Location magnifying glass icon, if needed. Note: Vendor Location is a default set of rules, or attributes, that define how an agency conducts business with a particular grantee. A vendor location comprises information such as payment terms, payment options, pay to bank accounts, etc. Although a vendor location is not an address, it does reference addresses.
10.	Note: Change the Claim Date using the calendar icon if needed. Claim date defaults to the current date and should be the date the claim is entered.
11.	Enter a unique Invoice ID up to 30 characters in the Invoice ID field.
12.	Click the Save button.
13.	Note: • Claim Header train stop updates to Complete. • Claim Number populates upon save.

SFS Handbook: Grantee Processing in SFS

Step	Action																				
14.	Claim Status is In Process & will auto update throughout the claim process. Note: The Claim Status options are: <table border="1"> <thead> <tr> <th>Claim Status</th><th>Status Description</th></tr> </thead> <tbody> <tr> <td>Approved</td><td>Claim is fully approved by all four levels of Agency Workflow</td></tr> <tr> <td>Complete</td><td>Claim is saved at Claim Summary page, but not yet submitted</td></tr> <tr> <td>In Process</td><td>Claim is saved at Claim Header page</td></tr> <tr> <td>Closed</td><td>Agency Approver has rejected the claim. Claim cannot be resubmitted</td></tr> <tr> <td>New</td><td>Claim is started but not yet saved</td></tr> <tr> <td>Returned</td><td>Claim is Denied for more information/additional documentation</td></tr> <tr> <td>Submitted</td><td>Claim has been submitted for Agency Review</td></tr> <tr> <td>Under Agency Review</td><td>Claim is in Workflow Approval Process</td></tr> <tr> <td>Cancelled</td><td>Grantee/Agency Proxy canceled prior to submission</td></tr> </tbody> </table>	Claim Status	Status Description	Approved	Claim is fully approved by all four levels of Agency Workflow	Complete	Claim is saved at Claim Summary page, but not yet submitted	In Process	Claim is saved at Claim Header page	Closed	Agency Approver has rejected the claim. Claim cannot be resubmitted	New	Claim is started but not yet saved	Returned	Claim is Denied for more information/additional documentation	Submitted	Claim has been submitted for Agency Review	Under Agency Review	Claim is in Workflow Approval Process	Cancelled	Grantee/Agency Proxy canceled prior to submission
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In Process	Claim is saved at Claim Header page																				
Closed	Agency Approver has rejected the claim. Claim cannot be resubmitted																				
New	Claim is started but not yet saved																				
Returned	Claim is Denied for more information/additional documentation																				
Submitted	Claim has been submitted for Agency Review																				
Under Agency Review	Claim is in Workflow Approval Process																				
Cancelled	Grantee/Agency Proxy canceled prior to submission																				
15.	Click the Next button. 																				

Claim Entry and Submission

[< Previous](#) [Next >](#)
 [New Window](#) | [Help](#) | [Personalize Page](#)

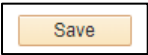
Contract Selection Complete	Select the Contract Period and Claim Line Type Business Unit: TDA01 Claim Number: 000005484 ✕ Contract ID: 000000000000000000102164 Description: FFY21 Rent Relief ARP Project Name: COVID19RENTARPZ Contract Begin Date: 10/01/2021 Contract Expire Date: 09/30/2023 Contract Max Amount: 7,760,554.00 Invoice ID: test4396 Claim Initiated Date: 04/25/2024 Supplier ID: 1000000386 Supplier Name: ██████████ Supplier Location: MAINEPAY ██████████ HEMPSTEAD NY 11550 Claim Status: In Process Claim Date: 04/25/2024 Claim Type: Regular
Claim Header Complete	
Claim Lines Complete	
Claim Line Details Not Started	
Claim Summary Not Started	

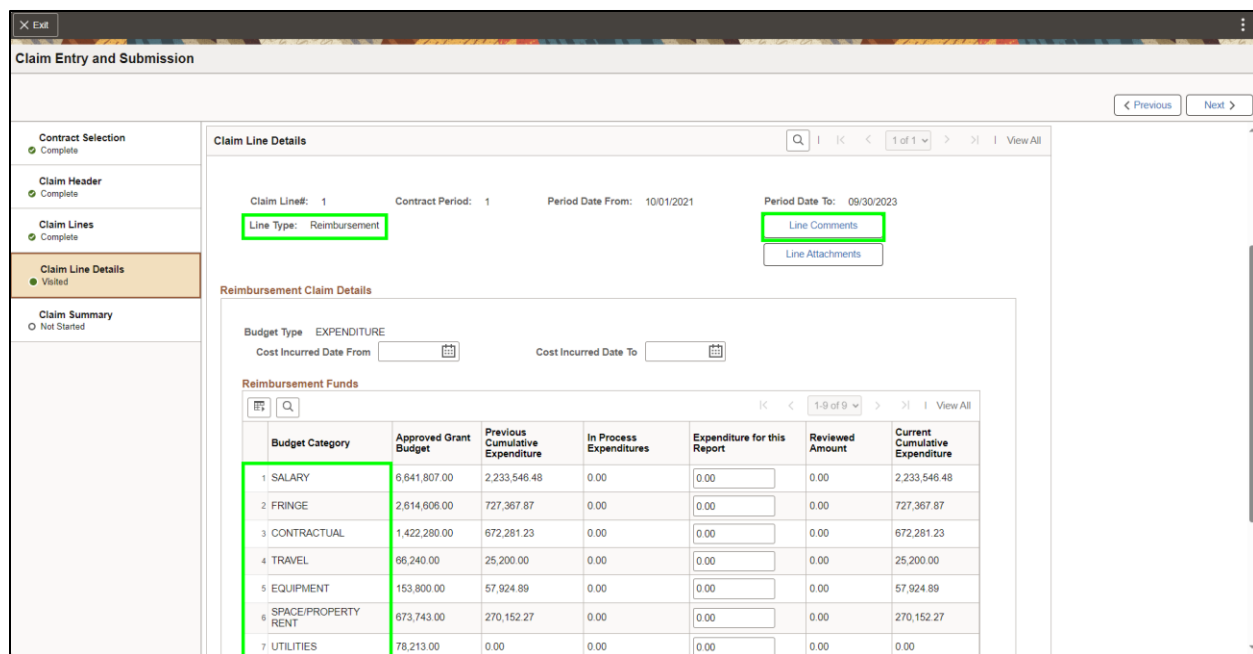
Line Number	Contract Period	Period From Date	Period To Date	Period Amount	Line Type		
1	1 Q	10/01/2021	09/30/2023	7,760,554.00	Reimbursement ▼	+	-

Save

Step	Action
16.	Select a Contract Period by clicking on the magnifying glass next to the field. Note: You would select the available contract period based on the payment schedule and due date listed on the contract.

SFS Handbook: Grantee Processing in SFS

Step	Action
17.	Click the Line Type dropdown menu and select the Reimbursement line type.
18.	Click the Save button.  Note: Claim Lines train stop updates to Complete.
19.	Click the Next button. 



Budget Category	Approved Grant Budget	Previous Cumulative Expenditure	In Process Expenditures	Expenditure for this Report	Reviewed Amount	Current Cumulative Expenditure
1 SALARY	6,641,807.00	2,233,546.48	0.00	0.00	0.00	2,233,546.48
2 FRINGE	2,614,606.00	727,367.87	0.00	0.00	0.00	727,367.87
3 CONTRACTUAL	1,422,280.00	672,281.23	0.00	0.00	0.00	672,281.23
4 TRAVEL	66,240.00	25,200.00	0.00	0.00	0.00	25,200.00
5 EQUIPMENT	153,800.00	57,924.89	0.00	0.00	0.00	57,924.89
6 SPACE/PROPERTY RENT	673,743.00	270,152.27	0.00	0.00	0.00	270,152.27
7 UTILITIES	78,213.00	0.00	0.00	0.00	0.00	0.00

Step	Action
20.	Validate Claim Line Details information. Line type is Reimbursement . Note: Budget categories and Approved Grant Budget amounts will transfer from the approved grant contract.
21.	Click the Line Comments button to add a line comment, if needed.

SFS Handbook: Grantee Processing in SFS

Claim Line Comments ✕

[Help](#)

Business Unit TDA01
Claim Number 000005484
Line Number 1

1 of 1

Comment

OK

Cancel

Step	Action
22.	Enter the applicable value into the Comments field. Note: Line comments are used to add any additional information pertaining to the line for the agency reviewers to view.
23.	Click the OK button.

✕ Exit
⋮

Claim Entry and Submission

Contract Selection ● Complete

Claim Header ● Complete

Claim Lines ● Complete

Claim Line Details ● Visited

Claim Summary ○ Not Started

Claim Line Details

1 of 1

Claim Line#: 1
Contract Period: 1
Period Date From: 10/01/2021
Period Date To: 09/30/2023

Line Type: Reimbursement

Reimbursement Claim Details

Budget Type EXPENDITURE
Cost Incurred Date From
Cost Incurred Date To

Reimbursement Funds

1 of 9

Budget Category	Approved Grant Budget	Previous Cumulative Expenditure	In Process Expenditures	Expenditure for this Report	Reviewed Amount	Current Cumulative Expenditure
1 SALARY	6,641,807.00	2,233,546.48	0.00	0.00	0.00	2,233,546.48
2 FRINGE	2,614,606.00	727,367.87	0.00	0.00	0.00	727,367.87
3 CONTRACTUAL	1,422,280.00	672,281.23	0.00	0.00	0.00	672,281.23
4 TRAVEL	66,240.00	25,200.00	0.00	0.00	0.00	25,200.00
5 EQUIPMENT	153,800.00	57,924.89	0.00	0.00	0.00	57,924.89
6 SPACE/PROPERTY RENT	673,743.00	270,152.27	0.00	0.00	0.00	270,152.27
7 UTILITIES	78,213.00	0.00	0.00	0.00	0.00	0.00

Page 211

SFS Handbook: Grantee Processing in SFS

Step	Action
24.	Click the Line Attachments button to add an attachment for a line, if needed.

Claims Attachments

Business Unit TDA01 Claim Number 000005484 Line Number 1

Description	Add Attachment	View Attachment	Attached File
1	Add Attachment	View Attachment	

OK Cancel

Step	Action
25.	Click the Add Attachment button.

Claims Attachments

Business Unit TDA01 Claim Number 000005484 Line Number 1

Description	Add Attachment	View Attachment	Attached File
1	Add Attachment	View Attachment	

OK Cancel

File Attachment

Choose File No file chosen

Upload Cancel

Step	Action
26.	Click the Choose File button.

Open

This PC > Desktop

Name	Date modified	Type	Size
Training Document.pdf	8/7/2023 8:34 AM	Microsoft Edge P...	184 KB

File name: Training Document.pdf

Upload from mobile Open Cancel

SFS Handbook: Grantee Processing in SFS

Step	Action
27.	Select your pdf file and click the Open button. Note: Only .pdf files can be uploaded.

The screenshot shows the 'Claims Attachments' interface. A modal dialog titled 'File Attachment' is open, allowing a file to be selected and uploaded. The file 'Training Document.pdf' is chosen. The 'Upload' button is highlighted with a green border. The background interface shows the claim details: Business Unit TDA01, Claim Number 000005484, and Line Number 1.

Step	Action
28.	Click the Upload button.

The screenshot shows the 'Claims Attachments' interface after the file has been uploaded. The 'Training Document.pdf' is now listed in the 'Attached File' column. The 'Description' field for the attachment is highlighted with a green border. The 'OK' button at the bottom left is also highlighted with a green border. The background interface remains the same with Business Unit TDA01, Claim Number 000005484, and Line Number 1.

Step	Action
29.	Enter a description of the document into the Description field.
30.	Click the OK button.

SFS Handbook: Grantee Processing in SFS

Contract Selection

Complete

Claim Header

Complete

Claim Lines

Complete

Claim Line Details

Visited

Claim Summary

Not Started

Cost Incurred Date From

09/16/2023

Cost Incurred Date To

09/30/2023

Reimbursement Funds

1-9 of 9

View All

Budget Category	Approved Grant Budget	Previous Cumulative Expenditure	In Process Expenditures	Expenditure for this Report	Reviewed Amount	Current Cumulative Expenditure
1 SALARY	6,641,807.00	2,233,546.48	0.00	10.00	0.00	2,233,556.48
2 FRINGE	2,614,606.00	727,367.87	0.00	5.00	0.00	727,372.87
3 CONTRACTUAL	1,422,280.00	672,281.23	0.00	2.00	0.00	672,283.23
4 TRAVEL	66,240.00	25,200.00	0.00	5.00	0.00	25,205.00
5 EQUIPMENT	153,800.00	57,924.89	0.00	3.00	0.00	57,927.89
6 SPACE/PROPERTY RENT	673,743.00	270,152.27	0.00	2.00	0.00	270,154.27
7 UTILITIES	78,213.00	0.00	0.00	5.00	0.00	5.00
8 OPERATING EXPENSES	766,198.00	302,573.87	0.00	6.00	0.00	302,579.87
9 OTHER	517,370.00	0.00	0.00	3.00	0.00	3.00
Grant Fund Totals	12,934,257.00	4,289,046.61	0.00	41.00	0.00	4,289,087.61
Match Fund Totals	0.00	0.00	0.00	0.00	0.00	0.00

Save

Previous

Next

Step	Action
31.	Enter the applicable dates into the Cost Incurred Date From field and the Cost Incurred Date To field. You can also use the calendar icons to select the dates. Note: Cost Incurred Date From and Cost Incurred Date To must be within the period date range.
32.	Enter the expenditure amounts for each budget category into the Expenditures for this Report field. Note: This is the amount you are requesting reimbursement for, for each budget category.
33.	Click the Save button Note: Claim Lines Details train stop updates to Complete.
34.	Click the Next button.

SFS Handbook: Grantee Processing in SFS

Claim Entry and Submission

Contract Selection Complete

Claim Header Complete

Claim Lines Complete

Claim Line Details Complete

Claim Summary Visited

Claim Header Comments History [View History](#)

Workflow Comment History [View History](#)

Add Claim Header Comment

Add Comments

Claim Line Summary

Line Number	Contract Period	Period From Date	Period To Date	Line Type	Amount Requested
1	1	10/01/2021	09/30/2023	Reimburse	41.00

Claim Line Comments Summary

Line Number	Comment	Comment Entered By	Comment Entered On

Claim Line Attachment Summary

Line Number	File Name	Description	Uploaded by User	View Attachment
1	Training_Document.pdf	Training Document	1000000386	View Attachment

Step	Action
35.	Enter the applicable text into the Add Claim Header Comment field. Note: Header comments are optional and used to enter additional information about the entire claim.
36.	Click the Add Comments button to add a claim header comment.

Claim Entry and Submission

Contract Selection Complete

Claim Header Complete

Claim Lines Complete

Claim Line Details Complete

Claim Summary Visited

Claim Line Summary

Line Number	Contract Period	Period From Date	Period To Date	Line Type	Amount Requested
1	1	10/01/2021	09/30/2023	Reimburse	41.00

Claim Line Comments Summary

Line Number	Comment	Comment Entered By	Comment Entered On

Claim Line Attachment Summary

Line Number	File Name	Description	Uploaded by User	View Attachment
1	Training_Document.pdf	Training Document	1000000386	View Attachment

☒ Claim Entry Complete

I certify that the above bill is just, true and correct, that no part thereof has been paid except as stated and that the balance is actually due and owing, and that taxes for which the State is exempt are excluded.

Signatory Name 1000000386
Date 04/25/2024

[Save](#) [Submit](#)

SFS Handbook: Grantee Processing in SFS

Step	Action
37.	Click the Claim Entry Complete checkbox.
38.	Click the Certification checkbox.
39.	Click the Save button
40.	Click the Submit button. Note: Claim Summary train stop updates to Complete.
41.	Click the OK button. The claim is submitted into agency workflow and the claim Status changes to Agency Review .
42.	You have successfully completed the Enter a New Claim – Reimbursement Amount topic.

Update an Existing Claim

Topic Description:

This topic provides the knowledge and skills to update an in process claim.

Note: The person who submits a grant claim will receive an email notification only when the grant claim is returned by the agency claim approver 1. There are no other email notifications for claims.

Topic Objective:

In this topic, you will learn:

- How to update and submit a saved claim

SFS role(s) required to perform this task:

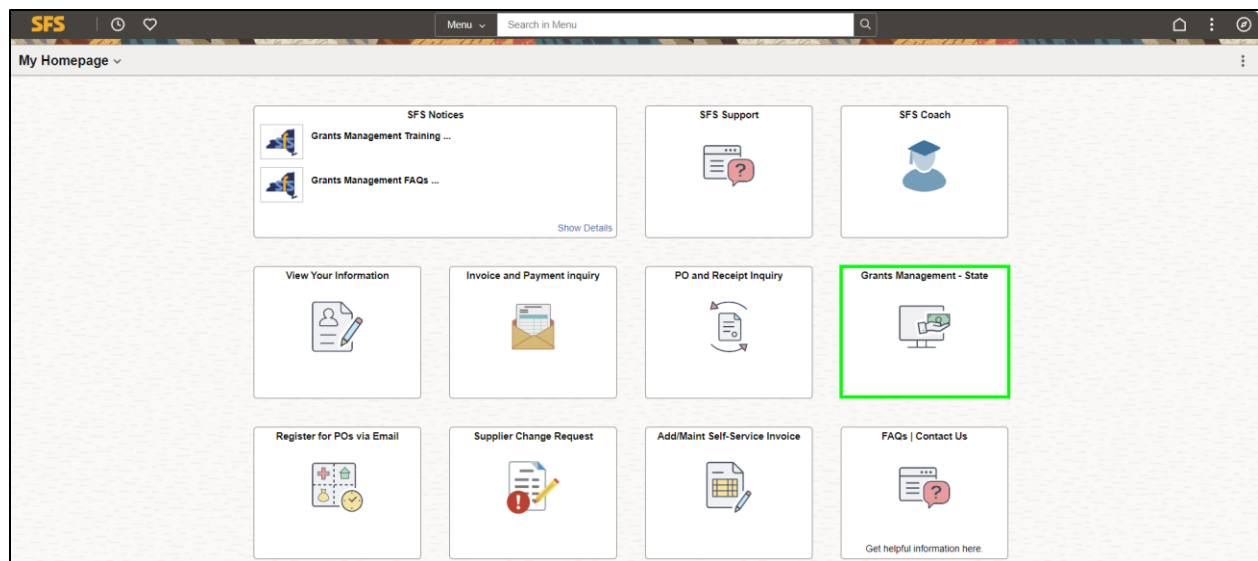
- Claim Initiator (NY_EM_SUPPLIER_CLAIM_ENTRY)
 - **Note:** This role allows you to enter a request for an advance (if allowed on the contract) or reimbursement claim. This role does not have the ability to certify or submit the claim.
- Claim Certifier and Submitter (NY_EM_SUPPLIER_CLAIM_CERT_SUB)
 - **Note:** This role allows you to certify and submit a request for an advance (if allowed on the contract) or reimbursement claim.

Procedure:

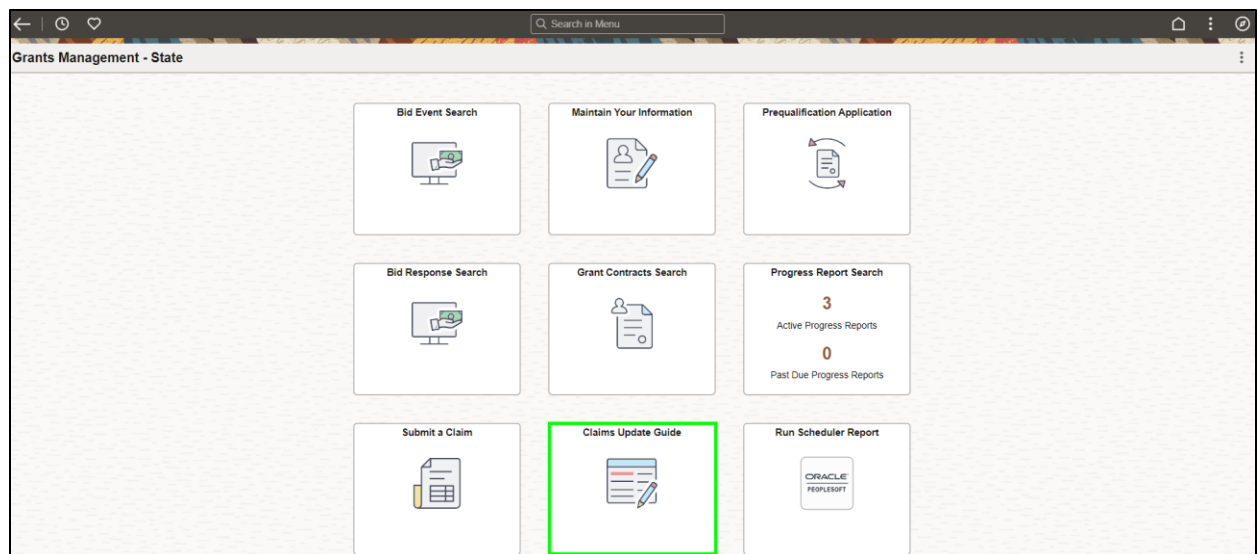
Scenario: You started entering a claim, but did not finish entering it, and saved the claim to work on later. You now need to complete the remaining claim information and submit the claim for agency approval.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

SFS Handbook: Grantee Processing in SFS



Step	Action
1.	Navigation: Click the Grants Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > eSettlements > Claims Update Guide. Note: You must log in to the SFS Vendor Portal to update an existing claim.



Step	Action
2.	Click the Claims Update Guide tile.

SFS Handbook: Grantee Processing in SFS

← | ↩ | ⌂

Q. Search in Menu

🏠 | ⋮ | ⌚

Claims Update Guide

New Window | Help | Personalize Page

Manage Claims

▼ Search Criteria

SetID

SHARE

Q

Business Unit

Q

Supplier ID

Q

Supplier Name

Q

Claim Number

Q

Claim Date

📅

Claim Status

In Process

▼

Contract ID

Q

NYS Contract #

Q

Invoice ID

Q

Invoice Date

📅

Search

Clear

Step	Action
3.	Enter the applicable search criteria in the Search Criteria fields or click the magnifying glass icon to look up the information.
4.	Click the Search button to display the search results.

Manage Claims

[Previous](#) |
 [Next >](#)

All Claims (1) ● Visited								
In Process (1) ● Visited	Select claim to be updated							
☐ Not Started ☒ Completed (0)	Filter Search							
Claim Number	Invoice Number	Claim Status	Contract ID	Business Unit	Claim Date	Claim Entered By User	Claim Last Updated By	Claim Total Amount
000000287	test5736	In Progress	000000000000000000000000141335	OMH01	04/25/2024	1000000386	1000000386	\$500.00

Step	Action
5.	Select the In Process menu on the left side of the page to view all in process claims.
6.	Click the Claim Number link associated to the claim you want to update.

SFS Handbook: Grantee Processing in SFS

Update Claim [< Previous](#)

Contract Selection
Complete

Claim Header
Complete

Claim Lines
Complete

Claim Line Details
Complete

Claim Summary
Validated

Claim Line Summary

Line Number	Contract Period	Period From Date	Period To Date	Line Type	Amount Requested
1	1	03/19/2024	03/19/2025	Advance	500.00

Claim Line Comments Summary

Line Number	Comment	Comment Entered By	Comment Entered On

Claim Line Attachment Summary

Line Number	File Name	Description	Uploaded by User	View Attachment
				View Attachment

☒ **Claim Entry Complete**

☒ I certify that the above bill is just, true and correct; that no part thereof has been paid except as stated and that the balance is actually due and owing, and that taxes for which the State is exempt are excluded.

Signatory Name: 1000000386
Date: 04/25/2024

[Save](#) [Submit](#)

Step	Action
7.	Select the applicable section(s) on the left of the page that you need to complete.
8.	After completing the remaining claims information, click the Claim Summary section to submit the claim for approval.
9.	Click the Claim Entry Complete checkbox.
10.	Click the Certification checkbox.
11.	Click the Save button
12.	Click the Submit button.
13.	Click the OK button.
	Claim is submitted into agency workflow and the claim Status changes to Agency Review .

SFS Handbook: Grantee Processing in SFS

Step	Action																				
14.	Claim Status is Agency Review & will auto update throughout the claim process. Note: The Claim Status options are: <table><tr><th>Claim Status</th><th>Status Description</th></tr><tr><td>Approved</td><td>Claim is fully approved by all four levels of Agency Workflow</td></tr><tr><td>Complete</td><td>Claim is saved at Claim Summary page, but not yet submitted</td></tr><tr><td>In Process</td><td>Claim is saved at Claim Header page</td></tr><tr><td>Closed</td><td>Agency Approver has rejected the claim. Claim cannot be resubmitted</td></tr><tr><td>New</td><td>Claim is started but not yet saved</td></tr><tr><td>Returned</td><td>Claim is Denied for more information/additional documentation</td></tr><tr><td>Submitted</td><td>Claim has been submitted for Agency Review</td></tr><tr><td>Under Agency Review</td><td>Claim is in Workflow Approval Process</td></tr><tr><td>Cancelled</td><td>Grantee/Agency Proxy canceled prior to submission</td></tr></table>	Claim Status	Status Description	Approved	Claim is fully approved by all four levels of Agency Workflow	Complete	Claim is saved at Claim Summary page, but not yet submitted	In Process	Claim is saved at Claim Header page	Closed	Agency Approver has rejected the claim. Claim cannot be resubmitted	New	Claim is started but not yet saved	Returned	Claim is Denied for more information/additional documentation	Submitted	Claim has been submitted for Agency Review	Under Agency Review	Claim is in Workflow Approval Process	Cancelled	Grantee/Agency Proxy canceled prior to submission
Claim Status	Status Description																				
Approved	Claim is fully approved by all four levels of Agency Workflow																				
Complete	Claim is saved at Claim Summary page, but not yet submitted																				
In Process	Claim is saved at Claim Header page																				
Closed	Agency Approver has rejected the claim. Claim cannot be resubmitted																				
New	Claim is started but not yet saved																				
Returned	Claim is Denied for more information/additional documentation																				
Submitted	Claim has been submitted for Agency Review																				
Under Agency Review	Claim is in Workflow Approval Process																				
Cancelled	Grantee/Agency Proxy canceled prior to submission																				
15.	You have successfully completed the Update an Existing Claim topic.																				

Update a Returned Claim

Topic Description:

This topic provides the knowledge and skills to update a claim returned by the agency.

Note: The person who submits a grant claim will receive an email notification only when the grant claim is returned by the agency claim approver 1. There are no other email notifications for claims.

Topic Objective:

In this topic, you will learn:

- How to update and resubmit a returned claim

SFS role(s) required to perform this task:

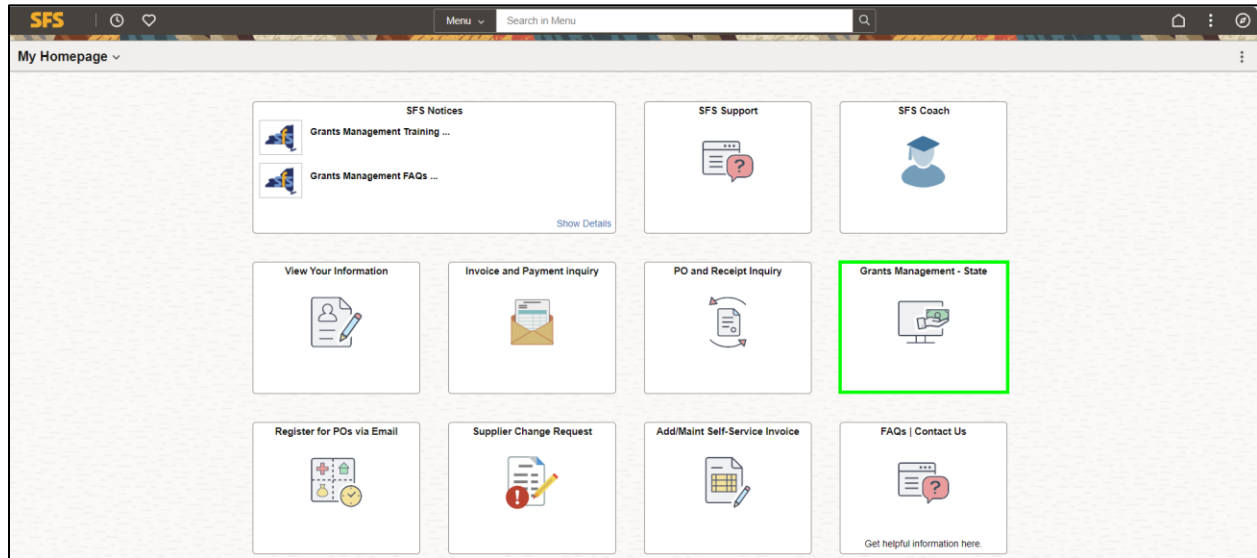
- Claim Initiator (NY_EM_SUPPLIER_CLAIM_ENTRY)
 - **Note:** This role allows you to enter a request for an advance (if allowed on the contract) or reimbursement claim. This role does not have the ability to certify or submit the claim.
- Claim Certifier and Submitter (NY_EM_SUPPLIER_CLAIM_CERT_SUB)
 - **Note:** This role allows you to certify and submit a request for an advance (if allowed on the contract) or reimbursement claim.

Procedure:

SFS Handbook: Grantee Processing in SFS

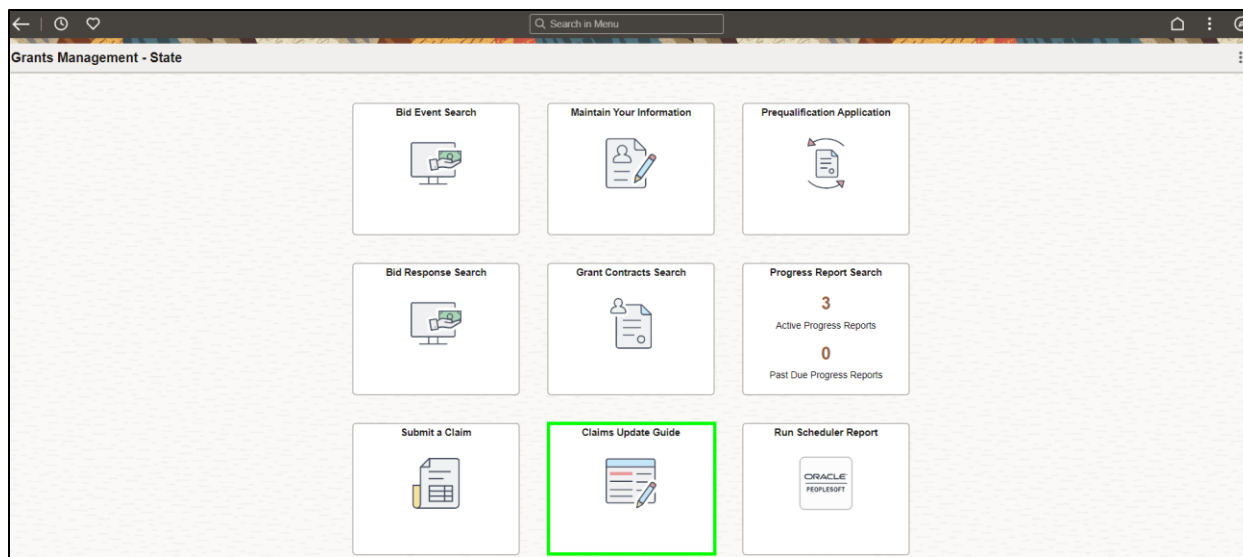
Scenario: You previously submitted a claim for agency review. The agency has returned your claim and requests that you attach additional supporting documentation. You need to update your claim with additional supporting documents and resubmit your claim to the agency for approval.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



Step	Action
1.	Navigation: Click the Grants Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > eSettlements > Claims Update Guide.

SFS Handbook: Grantee Processing in SFS



Step	Action
2.	Click the Claims Update Guide tile.

Step	Action
3.	Enter the applicable search criteria in the Search Criteria fields or click the magnifying glass icon to look up the information.
4.	Click the Claim Status drop-down field and select the Returned list item.
5.	Click the Search button to display the search results.

SFS Handbook: Grantee Processing in SFS

Manage Claims

< Previous Next >

New Window | Help | Personalize Page

All Claims (1) ● Visited Select claim to be updated							
In Process (0) ○ Not Started							
Returned (1) ● Visited							
Claim Number	Invoice Number	Claim Status	Contract ID	Project Name	Business Unit	Claim Date	Claim Entered By
0000000269	test#736	Returned	000000000000000000000000141335	Capital Equipment - HD	OMH01	04/25/2024	1000000396
Completed (0) ○ Not Started							

Step	Action
6.	Select the Returned menu on the left side of the page to view all returned claims.
7.	Click the Claim Number link associated to the claim you want to update.

X Exit

Update Claim

Contract Selection
Complete

Claim Header
Complete

Claim Lines
Complete

Claim Line Details
Complete

Claim Summary
Complete

Certify and Submit Claim after reviewing for completeness and accuracy.

Business Unit: OMH01 Claim Number: 000000287 ❌

Contract ID: 000000000000000000000000141335
Description: Capital Equipment - HD
Project Name: 00000000000012118

Supplier ID: 1000000386
Supplier Name:
Supplier Location: MAINEPAY HEMPSTEAD NY 11550

Claim Status: Returned
Claim Date: 04/25/2024
Claim Type: Regular

Contract Begin Date: 03/19/2024
Contract Expire Date: 03/19/2025
Contract Max Amount: 5,000.00
Invoice ID: test6736
Claim Initiated Date: 04/25/2024

Header Attachment Summary

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1-1 of 1

| View All

File Name	Description	Uploaded by User	View Attachment
1			<button>View Attachment</button>

Claim Header Comments History

Add Claim Header Comment

Add Comments

Workflow Comment History

Please attach additional documentation.
Comment Added By: jdbm
on 2024-04-25-11 45:23.000000

New Window | Help | Personalize Page...

Previous

Step	Action
8.	Click the Claim Summary menu on the left side of the page.
9.	View the workflow comments associated to the returned claim in the Workflow Comments History field. Click the View History link to view all the workflow comments associated with the claim.

SFS Handbook: Grantee Processing in SFS

Claims Comments

×

Help

Business Unit OMH01 Claim ID 000000287

1-1 of 1

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>>

View All

	Comments	Comment Entered By	Comment Entered On		
1	Please attach additional documentation.	jdoe	04/25/2024 11:45AM		

OK

Cancel

Step	Action
10.	After reviewing the workflow comment(s) information, click the OK button to return to the Claim Summary page.

[illegible]

Step	Action
11.	Make the update(s) requested by the agency. In this example, we will attach additional documentation, so we will click the Claim Line Details menu on the left of the page.
12.	Click the Line Attachments button to upload additional documentation.

SFS Handbook: Grantee Processing in SFS

Claims Attachments [X] [Help](#)

Business Unit OMH01 Claim Number 000000287 Line Number 1

1-1 of 1 | View All

Description	Add Attachment	View Attachment	Attached File	
1 Training Document	Add Attachment	View Attachment	Training_Document.pdf	+

OK Cancel

Step	Action
13.	Click the Add a New Row (+) icon to add a new row.

Claims Attachments [X] [Help](#)

Business Unit OMH01 Claim Number 000000287 Line Number 1

1-2 of 2 | View All

Description	Add Attachment	View Attachment	Attached File	
1 Training Document	Add Attachment	View Attachment	Training_Document.pdf	+
2	Add Attachment	View Attachment		+

OK Cancel

Step	Action
14.	Click the Add Attachment button to upload additional documentation.

Business Unit OMH01 Claim Number 000000287 Line Number 1

1-2 of 2 | View All

Description	Add Attachment	View Attachment	Attached File	
1 Training Document	Add Attachment	View Attachment	Training_Document.pdf	+
2	Add Attachment	View Attachment		+

OK Cancel

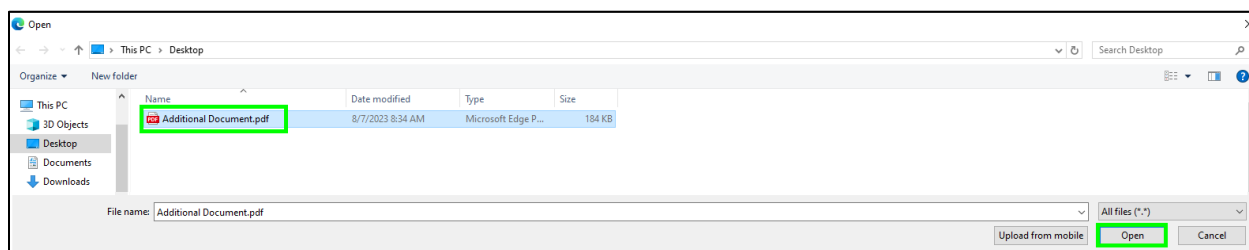
File Attachment [X]

Choose File No file chosen

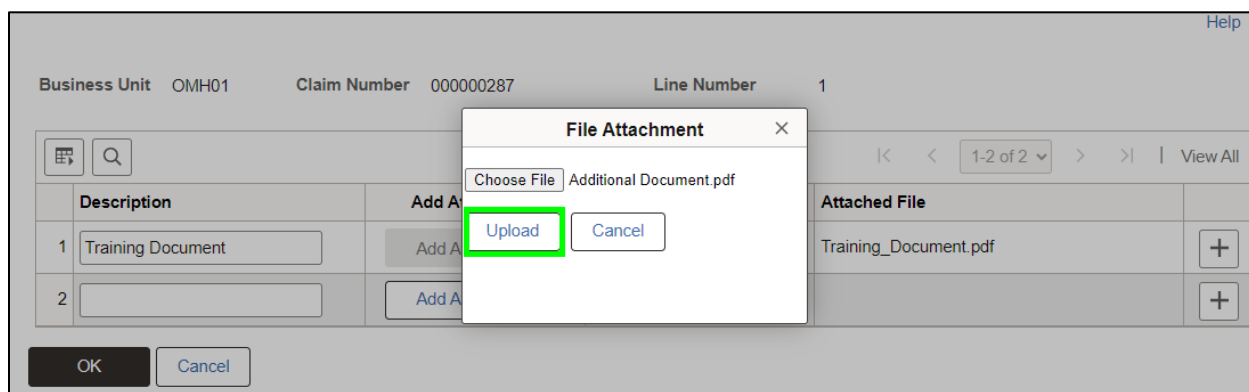
Upload Cancel

Step	Action
15.	Click the Choose File button.

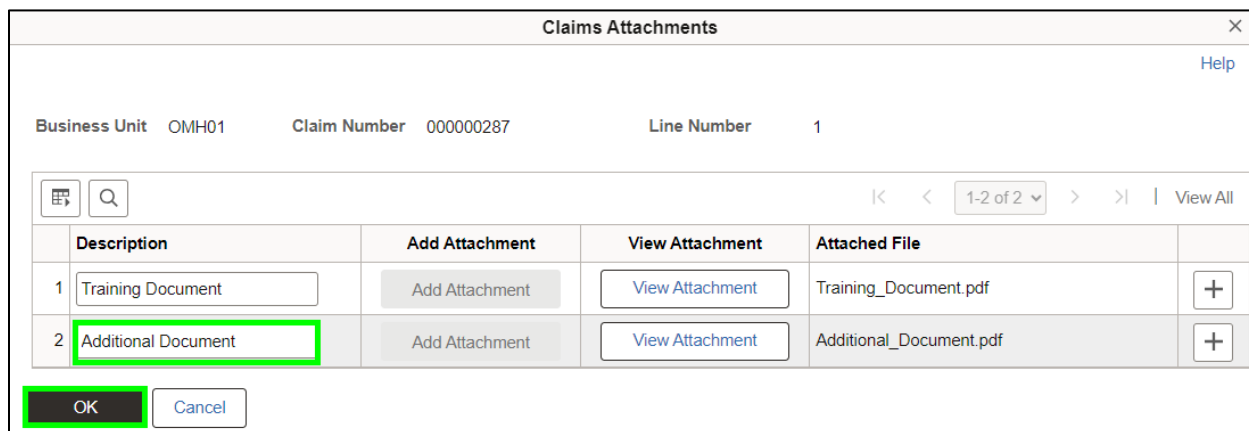
SFS Handbook: Grantee Processing in SFS



Step	Action
16.	Select your pdf file and click the Open button. Note: Only .pdf files can be uploaded.



Step	Action
17.	Click the Upload button.



Step	Action
18.	Enter the document description in the Description field.
19.	Click the OK button.

SFS Handbook: Grantee Processing in SFS

Step	Action
20.	Click the Save button.

Step	Action
21.	Click the Claim Summary menu on the left side of the page.

SFS Handbook: Grantee Processing in SFS

Step	Action																				
22.	Click the Claim Entry Complete check box.																				
23.	Click the Certification checkbox.																				
24.	Click the Save button.																				
25.	Click the Submit button.																				
26.	Click the OK button. The claim is submitted into agency workflow and the claim Status changes to Agency Review .																				
27.	Claim Status is Agency Review & will auto update throughout the claim process. Note: The Claim Status options are: <table border="1"> <thead> <tr> <th>Claim Status</th><th>Status Description</th></tr> </thead> <tbody> <tr> <td>Approved</td><td>Claim is fully approved by all four levels of Agency Workflow</td></tr> <tr> <td>Complete</td><td>Claim is saved at Claim Summary page, but not yet submitted</td></tr> <tr> <td>In Process</td><td>Claim is saved at Claim Header page</td></tr> <tr> <td>Closed</td><td>Agency Approver has rejected the claim. Claim cannot be resubmitted</td></tr> <tr> <td>New</td><td>Claim is started but not yet saved</td></tr> <tr> <td>Returned</td><td>Claim is Denied for more information/additional documentation</td></tr> <tr> <td>Submitted</td><td>Claim has been submitted for Agency Review</td></tr> <tr> <td>Under Agency Review</td><td>Claim is in Workflow Approval Process</td></tr> <tr> <td>Cancelled</td><td>Grantee/Agency Proxy canceled prior to submission</td></tr> </tbody> </table>	Claim Status	Status Description	Approved	Claim is fully approved by all four levels of Agency Workflow	Complete	Claim is saved at Claim Summary page, but not yet submitted	In Process	Claim is saved at Claim Header page	Closed	Agency Approver has rejected the claim. Claim cannot be resubmitted	New	Claim is started but not yet saved	Returned	Claim is Denied for more information/additional documentation	Submitted	Claim has been submitted for Agency Review	Under Agency Review	Claim is in Workflow Approval Process	Cancelled	Grantee/Agency Proxy canceled prior to submission
Claim Status	Status Description																				
Approved	Claim is fully approved by all four levels of Agency Workflow																				
Complete	Claim is saved at Claim Summary page, but not yet submitted																				
In Process	Claim is saved at Claim Header page																				
Closed	Agency Approver has rejected the claim. Claim cannot be resubmitted																				
New	Claim is started but not yet saved																				
Returned	Claim is Denied for more information/additional documentation																				
Submitted	Claim has been submitted for Agency Review																				
Under Agency Review	Claim is in Workflow Approval Process																				
Cancelled	Grantee/Agency Proxy canceled prior to submission																				
28.	You have successfully completed the Update a Returned Claim topic.																				

Claim Inquiry

Topic Description:

This topic provides the knowledge and skills for the user to inquire on grants claims in various statuses. **Note:** Data is view only on the claim inquiry pages.

Topic Objective:

In this topic, you will learn:

- How to inquire on a claim

SFS role required to perform this task:

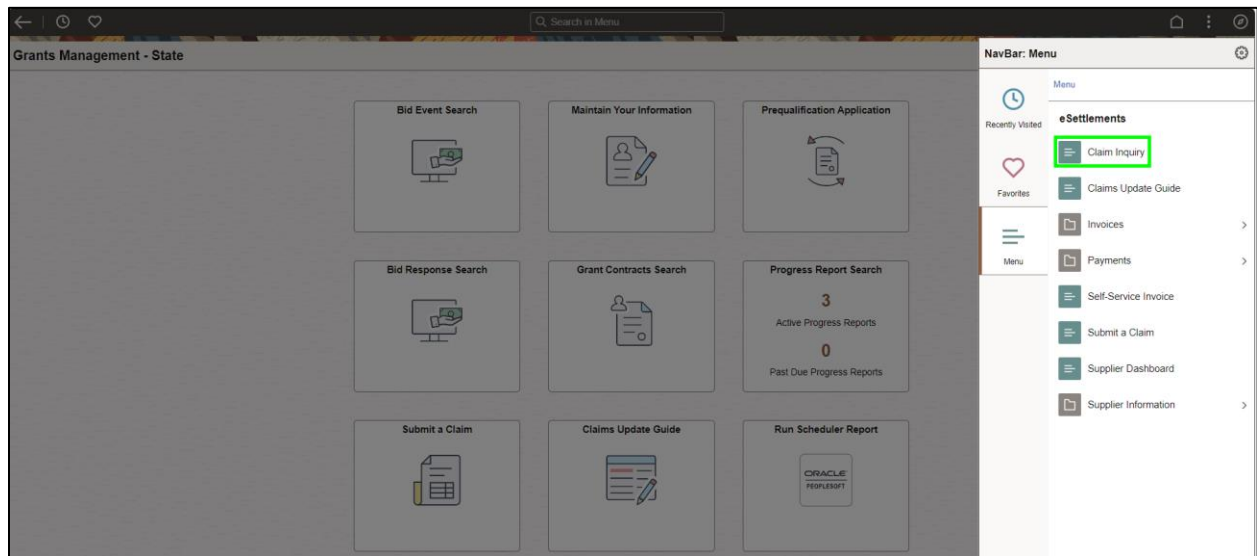
- Claim Inquiry (NY_EM_SUPPLIER_CLAIM_INQUIRY)

SFS Handbook: Grantee Processing in SFS

Procedure:

Scenario: You want to look up a claim and see where it is in the approval process.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



Step	Action
1.	From the NavBar navigate to: Menu > eSettlements > Claim Inquiry. Note: You must log in to the SFS Vendor Portal to view a claim.

SFS Handbook: Grantee Processing in SFS

Step	Action
2.	Note: The Claim Inquiry feature allows you to search for and view existing claims. The search criteria you use to search for existing claims can be saved under an Inquiry Name so you can access and reuse it each time you search for claim(s).
3.	If you already created and saved Claim Inquiry Name(s), you can use the Find an Existing Value page. You would enter the applicable search criteria and click the Search button to display the existing Inquiry Names that can be selected. <u>or</u> If the Claim Inquiry Name is not already established and you want to create a new Inquiry Name, click the Add a New Value button, enter the desired Claim Inquiry Name, and click the Add button.

Step	Action
4.	In this example, we will create new Inquiry Name Click the Add a New Value button.

SFS Handbook: Grantee Processing in SFS

Step	Action
5.	Enter the applicable name in the Inquiry Name field and click the Add button.

The screenshot shows the 'Claim Inquiry' page in the SFS system. The 'Search Criteria' section is expanded, displaying various search fields. The 'Search' button is highlighted with a green box. The fields include Inquiry Name (with a dropdown arrow), Business Unit (with a dropdown arrow), Vendor ID (with a dropdown arrow), NYS Contract # (with a dropdown arrow), Contract ID (with a dropdown arrow), Claim Reference/ Invoice ID (with a dropdown arrow), Claim ID (with a dropdown arrow), Claim Date (with a dropdown arrow and a calendar icon), and Claim Status (with a dropdown arrow). The 'Search' button is located at the top of the search criteria section. The 'Clear' and 'Reset' buttons are also visible.

Step	Action																				
6.	Enter the desired Business Unit, Vendor ID , and any other available search criteria if known. Note: Vendor ID is a required search field.																				
7.	Note: The Claim Status options are: <table border="1"> <thead> <tr> <th>Claim Status</th><th>Status Description</th></tr> </thead> <tbody> <tr> <td>Approved</td><td>Claim is fully approved by all four levels of Agency Workflow</td></tr> <tr> <td>Complete</td><td>Claim is saved at Claim Summary page, but not yet submitted</td></tr> <tr> <td>In Process</td><td>Claim is saved at Claim Header page</td></tr> <tr> <td>Closed</td><td>Agency Approver has rejected the claim. Claim cannot be resubmitted</td></tr> <tr> <td>New</td><td>Claim is started but not yet saved</td></tr> <tr> <td>Returned</td><td>Claim is Denied for more information/additional documentation</td></tr> <tr> <td>Submitted</td><td>Claim has been submitted for Agency Review</td></tr> <tr> <td>Under Agency Review</td><td>Claim is in Workflow Approval Process</td></tr> <tr> <td>Cancelled</td><td>Grantee/Agency Proxy canceled prior to submission</td></tr> </tbody> </table> In this example, we will not search by claim status.	Claim Status	Status Description	Approved	Claim is fully approved by all four levels of Agency Workflow	Complete	Claim is saved at Claim Summary page, but not yet submitted	In Process	Claim is saved at Claim Header page	Closed	Agency Approver has rejected the claim. Claim cannot be resubmitted	New	Claim is started but not yet saved	Returned	Claim is Denied for more information/additional documentation	Submitted	Claim has been submitted for Agency Review	Under Agency Review	Claim is in Workflow Approval Process	Cancelled	Grantee/Agency Proxy canceled prior to submission
Claim Status	Status Description																				
Approved	Claim is fully approved by all four levels of Agency Workflow																				
Complete	Claim is saved at Claim Summary page, but not yet submitted																				
In Process	Claim is saved at Claim Header page																				
Closed	Agency Approver has rejected the claim. Claim cannot be resubmitted																				
New	Claim is started but not yet saved																				
Returned	Claim is Denied for more information/additional documentation																				
Submitted	Claim has been submitted for Agency Review																				
Under Agency Review	Claim is in Workflow Approval Process																				
Cancelled	Grantee/Agency Proxy canceled prior to submission																				
8.	Click the Search button.																				

SFS Handbook: Grantee Processing in SFS

Claim Details Voucher and Payment ID

Business Unit	Vendor ID	Supplier Name	Claim ID	Invoice Number	Claim Date	Claim Status	Final Approval Date	NYS Cont
1 OVS01	1000006079		000007864	INVOVS01-C11419GG-1080200-007	12/15/2023	Approved		C11419GG
2 OVS01	1000006079		000007857	INVOVS01-C11418GG-1080200-002	09/14/2023	Approved		C11418GG
3 OVS01	1000006079		000007856	INVOVS01-C11418GG-1080200-001	09/14/2023	Approved		C11418GG
4 OVS01	1000006079		000007861	INVOVS01-C11419GG-1080200-004	07/27/2023	Approved		C11419GG
5 OVS01	1000006079		000007860	INVOVS01-C11419GG-1080200-003	04/18/2023	Approved		C11419GG
6 OVS01	1000006079		000007859	INVOVS01-C11419GG-1080200-002	03/31/2023	Approved		C11419GG
7 OVS01	1000006079		000006526	INVOVS01-C11114GG-1080200-020	12/27/2022	Approved		C11114GG
8 OVS01	1000006079		000006508	INVOVS01-C11113GG-1080200-014	12/15/2022	Approved		C11113GG
9 OVS01	1000006079		000006522	INVOVS01-C11114GG-1080200-015	11/22/2022	Approved		C11114GG
10 OVS01	1000006079		000006507	INVOVS01-C11113GG-1080200-013	11/01/2022	Approved		C11113GG
11 OVS01	1000006079		000006521	INVOVS01-C11114GG-1080200-014	08/26/2022	Approved		C11114GG

Save **Notify**

Step	Action
9.	Verify Claim Details and Voucher and Payment results for the desired claim.
10.	Note: Click the Save button to save the Inquiry Name for future use.
11.	On the Claim Details tab, click on the Claim ID link for the desired claim.

Review Claims Component

Header Details

Business Unit: OVS01	Claim Number: 000007864	Claim Type: Conversion
Supplier Name: [REDACTED]	Contract ID: 00000000000000000000109235	Claim Initiated Dt:
Supplier ID: 1000006079	Contract Max Amount: \$1,865,507.00	Claim Received Dt:
Supplier Location: MAINEPAY	Grantee Claim Reference: INVOVS01-C11419GG-1080200-007	Final Approval Dt:
Description: OVS01-C11419GG-1080200	Claim Date: 12/15/2023	
Project Name: Victim Assistance 2020	Net Days in Review: 0	
Contract Begin Dt: 10/01/2022	MIR Adjustment Date:	
Contract Expire Dt: 09/30/2025		

Bypass eSettlement Review ☐
 Bypass Agency Voucher Approval ☐ Claim Status: Approved Voucher ID: 00021236 Approval Step:

Line Details

Line #	Line Type	Contract Period	Contract Period Amount	Requested Amount	Reviewed Amount	Net Payment Amount	Reviewed	Modified By	Modified On
1	Reimbursement	1	\$621,835.67	\$168,730.37	\$168,730.25	\$168,730.25	Yes	NY_GRCIM_CNV	01/14/2024 12:13:25AM

Claim Comments: [REDACTED] Header Comments (0)
 Workflow Comments (0)

Add Comment: [REDACTED]

☒ Show to Supplier ☐ Show in Invoice

Attachments (1) **Preview Claim**
View Approvals

Step	Action
12.	Click the View Approvals link.

SFS Handbook: Grantee Processing in SFS

Claim Approvals Monitor

Help

Claims Approval Workflow Path

▼ Claim Approval Workflow: **Approved**

Claims Approval Workflow

```
graph LR; A[Approved  
Agency_Rvwr_Aprr_1C  
Claims Approver Level 1  
03/21/24 - 11:41 AM] --> B[Approved  
Agency_Rvwr_Aprr_2C  
Claims Approver Level 2  
03/21/24 - 3:59 PM]; B --> C[Approved  
Agency_Rvwr_Aprr_3A  
Claims Approver Level 3  
03/21/24 - 4:01 PM]; C --> D[Approved  
Agency_Rvwr_Aprr_4A  
Claims Approver Level 4  
03/21/24 - 4:09 PM];
```

The diagram illustrates the Claims Approval Workflow Path, which consists of four sequential steps, all of which are marked as **Approved**. Each step is represented by a green box containing a green checkmark, the step name, the approver's name and level, and the approval timestamp.

- Step 1:** Approved
Agency_Rvwr_Aprr_1C
Claims Approver Level 1
03/21/24 - 11:41 AM
- Step 2:** Approved
Agency_Rvwr_Aprr_2C
Claims Approver Level 2
03/21/24 - 3:59 PM
- Step 3:** Approved
Agency_Rvwr_Aprr_3A
Claims Approver Level 3
03/21/24 - 4:01 PM
- Step 4:** Approved
Agency_Rvwr_Aprr_4A
Claims Approver Level 4
03/21/24 - 4:09 PM

Step	Action
13.	After reviewing the approval workflow, click the Close (X) icon.

Q

Search in Menu

Claim Review Summary

Header Details

Business Unit: OVS01

Supplier Name:

Supplier ID: 1000006079

Supplier Location: MAINEPAY

Description: OVS01-C11419GG-1080200

Project Name: Victim Assistance 2020

Contract Begin Dt: 10/01/2022

Contract Expire Dt: 09/30/2025

Claim Number: 000007864

Contract ID: 00000000000000000000109235

Contract Max Amount: \$1,865,507.00

Grantee Claim Reference: INV/OVS01-C11419GG-1080200-007

Claim Date: 12/15/2023

Net Days in Review: 0

MIR Adjustment Date:

Claim Type: Conversion

Claim Initiated Dt:

Claim Received Dt:

Final Approval Dt:

Bypass eSettlement Review ☐

Bypass Agency Voucher Approval ☐

Claim Status: Approved

Voucher ID: 00021236

Approval Step:

Line Details

1 of 1 >

Line #	Line Type	Contract Period	Contract Period Amount	Requested Amount	Reviewed Amount	Net Payment Amount	Reviewed	Modified By	Modified On
1	Reimbursement	1	\$621,835.67	\$168,730.37	\$168,730.25	\$168,730.25	Yes	NY_GRCLM_CNV	01/14/2024 12:13:25AM

Claim Comments

Header Comments (0)

Workflow Comments (0)

Add Comment

☐ Show to Supplier ☐ Show in Invoice

Attachments (1)

Preview Claim View Approvals

Step	Action
14.	Click the Reviewed Amount button.

SFS Handbook: Grantee Processing in SFS

← | 🕒 | ❤️

Reimbursement Claim Review

Total	\$621,835.67	\$453,094.92	\$0.00	\$168,730.37	\$168,730.25	\$621,825.17
-------	--------------	--------------	--------	--------------	--------------	--------------

▼ Match Funds

1-10 of 10 ▼

Match

	Budget Category	Approved Budget	Previous Cumulative Expenditure	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures
1	CONTRACTUAL	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2	EQUIPMENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3	FRINGE	\$33,225.85	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4	OPERATING EXPENSES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5	OTHER	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	SALARY	\$102,831.28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	SPACE/PROPERTY OWN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8	SPACE/PROPERTY RENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	TRAVEL	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10	UTILITIES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total		\$156,057.13	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

OK Cancel Line Comments (0) Attachments (2)

Step	Action
15.	Click the Line Comments button (the number in parenthesis indicates the number of comments).

Reimbursement Line Comments

Help

Line Comments

Business Unit: OVS01 Claim Number: 000007864 Line Nbr: 1 Claim Type: Reimbursement

☒ Show to Supplier
☒ Show In Invoice

Line Comment History 🔍 | |< < 1 of 1 > >|

Seq		☐ Show to Supplier	Created By:	Created On:	Role
		☐ Show In Invoice			

OK Cancel

Step	Action
16.	Click the Cancel button when your review of the line comments is complete. Note: The OK button isn't active because this claim is already approved.

SFS Handbook: Grantee Processing in SFS

Reimbursement Claim Review

Total	\$621,835.67	\$453,094.92	\$0.00	\$168,730.37	\$168,730.25	\$621,825.17
-------	--------------	--------------	--------	--------------	--------------	--------------

▼ Match Funds

1-10 of 10 ▼

Budget Category	Approved Budget	Previous Cumulative Expenditure	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures
1 CONTRACTUAL	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2 EQUIPMENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3 FRINGE	\$33,225.95	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4 OPERATING EXPENSES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5 OTHER	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6 SALARY	\$102,831.28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7 SPACE/PROPERTY OWN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8 SPACE/PROPERTY RENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9 TRAVEL	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10 UTILITIES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Total	\$156,057.13	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-------	--------------	--------	--------	--------	--------	--------

OK
Cancel
Line Comments (0)
Attachments (2)

Step	Action
17.	Click the Attachments button (the number in parenthesis indicates the number of attachments).

Reimbursement Line Attachments

Line Attachments

[Help](#)

Business Unit: CVS01

Claim Number: 000007864

Line Nbr: 1

Claim Type: Reimbursement

Upload Instructions

Only PDF files can be uploaded.
Files greater than 20 Mb will not be allowed for upload.
Enter File Description before clicking on Add Attachment

File Description

☒ Show To Supplier
☐ Show In Invoice

Add Attachment

Line Attachments

1-2 of 2

File Details

ID>

	File Name	Description	Show To Supplier	Show In Invoice	Created By	Created On	View Attachment
1	OBJID_187067_fupFileUpload.pdf	Supporting Documentation-Salary-Payroll supporting doc	☒	☐		01/14/24 4:56:32AM	View Attachment
2	OBJID_187067_fupFileUpload.pdf	Supporting Documentation-Salary-Q4-Final FCR	☒	☐		01/14/24 4:57:10AM	View Attachment

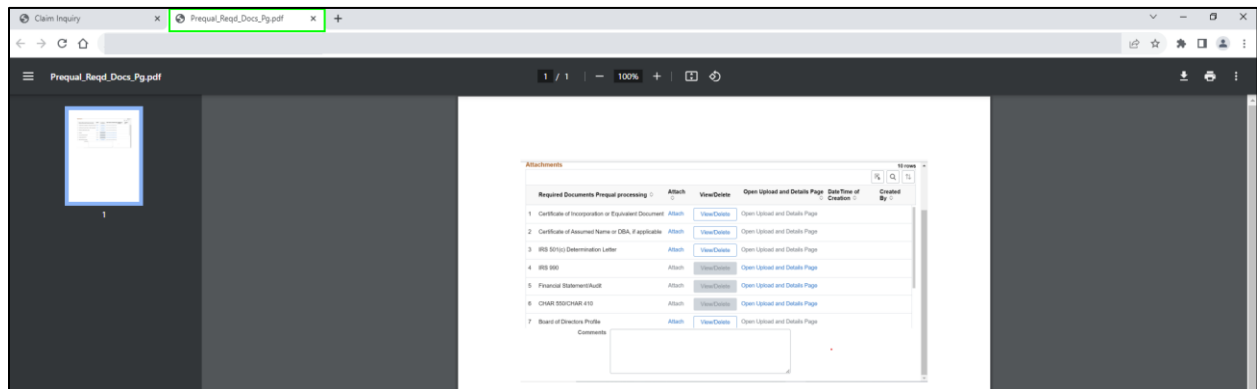
OK

Cancel

Step	Action
------	--------

SFS Handbook: Grantee Processing in SFS

18. Click the **View Attachment** button for the document you would like to review.



Step	Action
------	--------

- | | |
|-----|--|
| 19. | When you are finished reviewing the attachment, click the Close (X) button. |
|-----|--|

Reimbursement Line Attachments

Line Attachments

Business Unit: OVS01 Claim Number: 000007864 Line Nbr: 1 Claim Type: Reimbursement

Upload Instructions
 Only PDF files can be uploaded.
 Files greater than 20 Mb will not be allowed for upload.
 Enter File Description before clicking on Add Attachment

File Description: Add Attachment

☐ Show To Supplier
☐ Show In Invoice

Line Attachments

1-2 of 2

File Name	Description	Show To Supplier	Show In Invoice	Created By	Created On	View Attachment
1 OBJID_187067_fupFileUpload.pdf	Supporting Documentation-Salary-Payroll supporting doc	☒	☐		01/14/24 4:56:32AM	View Attachment
2 OBJID_187067_fupFileUpload.pdf	Supporting Documentation-Salary-Q4-Final FCR	☒	☐		01/14/24 4:57:10AM	View Attachment

OK Cancel

Step	Action
------	--------

- | | |
|-----|--|
| 20. | Click the Cancel button to return to the previous page. |
|-----|--|

Note: The **OK** button isn't active because this claim is already approved.

Search in Menu

Reimbursement Claim Review

Total\$621,835.67\$453,094.92\$0.00\$168,730.37\$168,730.25\$621,825.17

Match Funds

1-10 of 10

Match

Budget Category	Approved Budget	Previous Cumulative Expenditure	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures
1 CONTRACTUAL	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2 EQUIPMENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3 FRINGE	\$33,225.85	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4 OPERATING EXPENSES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5 OTHER	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6 SALARY	\$102,831.28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7 SPACE/PROPERTY OWN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8 SPACE/PROPERTY RENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9 TRAVEL	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10 UTILITIES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Total\$156,057.13\$0.00\$0.00\$0.00\$0.00\$0.00

OK

Cancel

Line Comments (0)

Attachments (2)

[illegible]

SFS Handbook: Grantee Processing in SFS

Step	Action
22.	Click the Header Comments link to view any header comments for the claim.
23.	Click the Workflow Comments link to view workflow comments for the claim.
24.	Click the Preview Claim link to view the PFD version of the claim. Note: Once the claim is approved, the preview claim link will be grayed out and the claim PDF is only accessible as an attachment via the Attachments button.
25.	In this example, click the Attachments button to view the PDF version of the claim since the claim is Approved.

Claim Header Attachment

Attachment Details

Business Unit: OVS01

Claim Number: 000007864

Upload Instructions

Only PDF files can be uploaded.
Files greater than 20 Mb will not allowed for upload.
Enter File Description before clicking on Add Attachment

File Description:

☐ Show to Supplier
☐ Show In Invoice

Add Attachment

Header Attachment

1-1 of 1

>

>|

File Details

	View Attachment	File Description	File Name	Uploaded By	Uploaded On	Show to Supplier	Show in Invoice
1	View Attachment	Final Pdf	CLAIM_OVS01_000007864.pdf	JDOE	01/14/24 5:02AM	☒	☒

OK

Cancel

Step	Action
26.	Click the View Attachment button to view the PDF version of the claim.

SFS Handbook: Grantee Processing in SFS

z.lp.BKO9l6TcLnx5n827ftvL1egPcjmla0adR_iZM2R034VKtPwGm9nwHSS500MaeJHNNlzBoSwGZb0GV2wmDqY1u.lb7KuL1f9akvCzp6UfM2

1 of 14

 New York State
Grants Gateway

Payment Request - OVS01-RFA-2022-00067

Victims of Crime Act Victim and Witness Assistance Grant Program

INVOVS01-C11419GG-1080200-007

Claim

12/15/2023

Grant Opportunity and Contract Information

- State Agency Name: Office of Victim Services
- Grant Opportunity Name: Victims of Crime Act (VOCA) Victim and Witness Assistance Grant Program
- Grant Application Number: OVS01-RFA-2022-00067
- Contract Term: 10/01/22 - 09/30/25
- Contract Period: 10/01/22 - 09/30/23

Payment Information

- Invoice Number: INVOVS01-C11419GG-1080200-007
- Payment Period: 07/01/23 - 09/30/23
- Requested Payment Amount: \$168,730.37
- Audited Payment Amount: \$168,730.25
- Total Adjustments: \$0.00
- Net Payment Amount: \$168,730.25

Step	Action
27.	After viewing the PDF version of the claim, click the Close (X) icon in the browser tab to close the claim window

SFS Handbook: Grantee Processing in SFS

Claim Header Attachment

×

Help

Attachment Details

Business Unit: OVS01 Claim Number: 000007864

Upload Instructions

Only PDF files can be uploaded.
Files greater than 20 Mb will not allowed for upload.
Enter File Description before clicking on Add Attachment

File Description: ☐ Show to Supplier
☐ Show In Invoice

Add Attachment

Header Attachment

1-1 of 1

>

>|

File Details

||>

	View Attachment	File Description	File Name	Uploaded By	Uploaded On	Show to Supplier	Show in Invoice
1	View Attachment	Final Pdf	CLAIM_OVS01_000007864.pdf	JDOE	01/14/24 5:02AM	☒	☒

OK

Cancel

Step	Action
28.	Click the Cancel button to return to the Claim Review Summary page.

Review Claims Component																													
Header Details																													
Business Unit: OVS01		Claim Number: 000007964		Claim Type: Conversion																									
Supplier Name:		Contract ID: 00000000000000000000109235		Claim Initiated Dt:																									
Supplier ID: 1000006079		Contract Max Amount: \$1,865,507.00		Claim Received Dt:																									
Supplier Location: MAINEFRY		Grantee Claim Reference: INVVOVS01-C11419GG-1080200-007		Final Approval Dt:																									
Description: OVS01-C11419GG-1080200		Claim Date: 12/15/2023																											
Project Name: Victim Assistance 2020		Net Days in Review: 0																											
Contract Begin Dt: 10/01/2022		MIR Adjustment Date:																											
Contract Expire Dt: 09/30/2025																													
☐ Bypass eSettlement Review ☐ Bypass Agency Voucher Approval																													
Claim Status: Approved		Voucher ID: 00021236		Approval Step:																									
Line Details																													
1 of 1 > < <table border="1"> <thead> <tr> <th>Line #</th> <th>Line Type</th> <th>Contract Period</th> <th>Contract Period Amount</th> <th>Requested Amount</th> <th>Reviewed Amount</th> <th>Net Payment Amount</th> <th>Reviewed</th> <th>Modified By</th> <th>Modified On</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Reimbursement</td> <td>1</td> <td>\$621,835.67</td> <td>\$168,730.37</td> <td> \$168,730.25 </td> <td> \$168,730.25 </td> <td>Yes</td> <td>NY_GRCLM_CNV</td> <td>01/14/2024 12:13:25AM</td> </tr> </tbody> </table>										Line #	Line Type	Contract Period	Contract Period Amount	Requested Amount	Reviewed Amount	Net Payment Amount	Reviewed	Modified By	Modified On	1	Reimbursement	1	\$621,835.67	\$168,730.37	\$168,730.25	\$168,730.25	Yes	NY_GRCLM_CNV	01/14/2024 12:13:25AM
Line #	Line Type	Contract Period	Contract Period Amount	Requested Amount	Reviewed Amount	Net Payment Amount	Reviewed	Modified By	Modified On																				
1	Reimbursement	1	\$621,835.67	\$168,730.37	\$168,730.25	\$168,730.25	Yes	NY_GRCLM_CNV	01/14/2024 12:13:25AM																				
Claim Comments: Header Comments (0) Workflow Comments (0)																													
Add Comment																													
☐ Show to Supplier ☐ Show in Invoice																													
Cancel Attachments (1) View Approvals																													

Step	Action
29.	Click the Cancel button to return to the Claim Inquiry Search page.
30.	You have successfully completed the Claim Inquiry topic.

SFS Handbook: Grantee Processing in SFS

Grantee Reports and Queries

Lesson Description:

This lesson provides the knowledge and skills to process grantee reports and queries.

Lesson Objectives:

In this lesson, you will learn how to:

- Run the Vendor Contract Summary Report

Run the Vendor Contract Summary Report

Topic Description:

This topic provides the knowledge and skills to run the Vendor Contract Summary report. This report provides grant related contract and bid event data at a summary level.

Topic Objectives:

In this topic, you will learn:

- How to run the Vendor Contract Summary report.

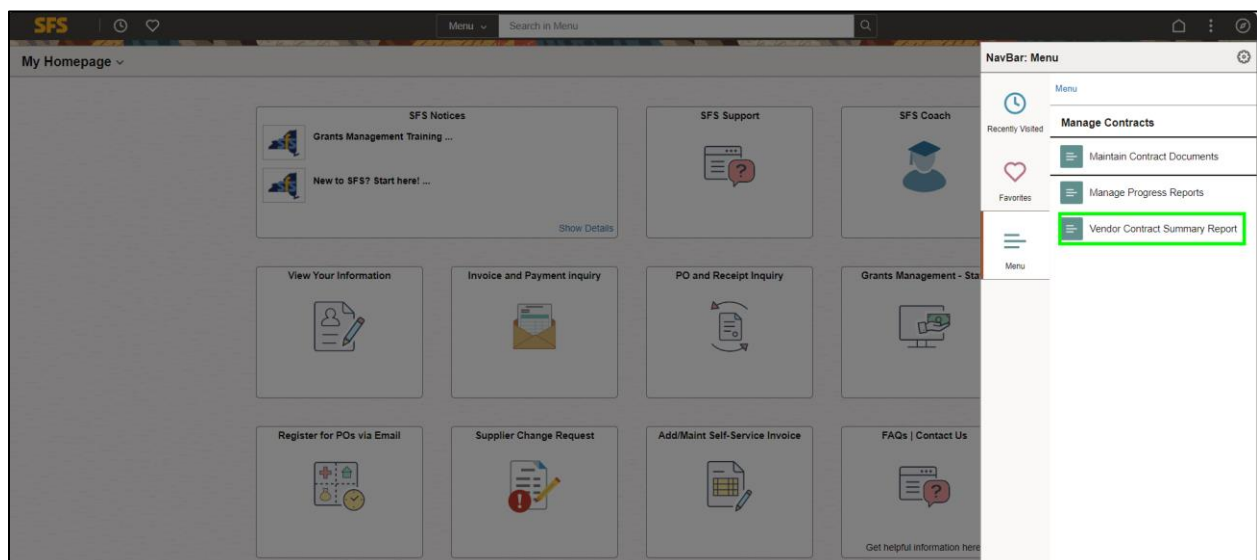
SFS role required to perform this task:

- Grants Contract Editor (NY_ES_VNDR_CNTRCT_CHANGE)

Procedure

Scenario: You would like to review grant related contract and bid event data at a summary level so you will run the Vendor Contract Summary report.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



SFS Handbook: Grantee Processing in SFS

Step	Action
1.	From the NavBar navigate to: Menu > Manage Contracts > Vendor Contract Summary Report

Step	Action
2.	Enter the applicable values in the search criteria fields which consist of the following fields: SetID, Business Unit, Bid Event ID, Vendor Type, Vendor ID, Contract ID, NYS Contract Number, Contract Status, Contract Type, Contract Begin Date, Contract Expire Date, Period, Period From Date, and Period To Date. Note: - SetID defaults to SHARE and doesn't need to be changed. - SetID and Business Unit are required fields. Business Unit is the SFS ID for the NYS Agency.
3.	Click the View Results button to display the search results based on the entered search criteria.

SFS Handbook: Grantee Processing in SFS

NY_ES_CONTRACT_SUMMARY_QRY - Vendor Contract Summary Report

SetID: **SHARE**

*Business Unit: OAH01

Bid Event ID:

Vendor Type: Not-For-Profit

Vendor ID:

Contract ID:

NYS Contract Number:

Contract Status:

Contract Type:

Contract Begin Date:

Contract Expires Date:

Period From:

Period To:

View Results

Download results in: Excel Spreadsheet CSV Text File XML File (2515 kb)

View All

Row	Business Unit	Contract ID	NYS Contract Number	Bid Event ID	Bid Event Name	Organization Type	Vendor ID	Vendor Name	Contract Type	Contract Status	Contract Begin Date	Contract Expires Date	Contract Amount	Period From	Period To	Project ID	Project Description	
1	OAH01	0000000000000000000000001038	OMH01-C0025GOG-3650000		NPFT		1000011911		FT	A	07/01/2015	06/30/2020	741891.000	1	07/01/2015	06/30/2020	0000000000062303	OMH01-REHAB-2015
2	OAH01	0000000000000000000000001039	OMH01-C002610G-3650000		NPFT		1000003324		FT	A	07/24/2015	07/23/2020	6231250.000	1	07/24/2015	07/23/2020	0000000000062334	OMH01-RFP13-2015
3	OAH01	0000000000000000000000001030	OMH01-C002620G-3650000		NPFT		1000011911		FT	A	10/01/2015	09/30/2020	117962.000	1	10/01/2015	09/30/2020	0000000000062304	OMH01-REHAB-2015
4	OAH01	0000000000000000000000002075	OMH01-C002840G-3650000		NPFT		100015486		FT	A	08/06/2015	08/06/2020	1150000.000	1	08/06/2015	08/06/2020	0000000000062305	OMH01-REHAB-2015
5	OAH01	0000000000000000000000002259	OMH01-C002540G-3650000		NPFT		1000014581		FT	A	07/06/2015	07/05/2020	515272.000	1	07/06/2015	07/05/2020	0000000000062301	OMH01-REHAB-2015
6	OAH01	0000000000000000000000002710	OMH01-C002960G-3650000		NPFT		1000039630		FT	A	10/05/2015	10/04/2020	3520000.000	1	10/05/2015	10/04/2020	0000000000062336	OMH01-RFP13-2015
7	OAH01	0000000000000000000000003042	OMH01-C002850G-3650000		NPFT		1000016882		FT	A	07/27/2015	07/26/2020	5934171.000	1	07/27/2015	07/26/2020	0000000000062335	OMH01-RFP13-2015
8	OAH01	00000000000000000000000030128	OMH01-C002590G-3650000		NPFT		1000041274		FT	A	08/20/2015	08/19/2020	9300000.000	1	08/20/2015	08/19/2020	0000000000062332	OMH01-RFP13-2015
9	OAH01	0000000000000000000000004043	OMH01-C002600G-3650000		NPFT		1000014581		FT	A	07/24/2015	07/23/2020	9975381.000	1	07/24/2015	07/23/2020	0000000000062333	OMH01-RFP13-2015
10	OAH01	0000000000000000000000004245	OMH01-C002550G-3650000		NPFT		1000011908		FT	A	04/27/2015	04/26/2020	1113891.000	1	04/27/2015	04/26/2020	0000000000062302	OMH01-REHAB-2015
11	OAH01	00000000000000000000000007119	OMH01-C002390G-3650000		NPFT		1000041274		FT	A	01/01/2015	12/31/2016	84333.000	1	01/01/2015	12/31/2016	0000000000062390	OMH01-MRT-2015

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Step	Action
4.	Review the search results which consists of the following data elements: Business Unit, Contract ID, NYS Contract Number, Bid Event ID, Bid Event Name, Organization Type, Vendor ID, Vendor Name, Contract Type, Contract Status, Contract Begin Date, Contract Expire Date, Contract Amount, Period, Period From Date, Period To Date, Project ID, and Project Description.
5.	Note: The results can be downloaded into an Excel Spreadsheet , a CSV Text File , or an XML File by clicking on the appropriate link.
6.	You have successfully completed the Run the Vendor Contract Summary Report topic.